DOCUMENT RESUME

ED 349 641 EA 024 211

AUTHOR	Purnell, Susanna W.; And Others
TITLE	Section 6 Schools in Six States: Eleven Case Studies of Transfer Issues. A RAND Note.
INSTITUTION	Rand Corp., Santa Monica, Calif.
SPONS AGENCY	Office of the Assistant Secretary of Defense for Force Management and Personnel (DOD), Washington, DC.
REPORT NO	RAND-N-2993-FMP
PUB DATE	91
CONTRACT	MDA903-85-C-0030
NOTE	259p.
AVAILABLE FROM	RAND, 1700 Main Street, Santa Monica, CA 90407-2138 ($25 plus $2 shipping; quantity discounts).
PUB TYPE	Reports - Research/Technical (143)
EDRS PRICE	MF01 Plus Postage. PC Not Available from EDRS.
DESCRIPTORS	Case Studies; Elementary Secondary Education; Federal Aid; *Governance; *Government School Relationship; Military Personnel; School Districts; Transfer Policy
IDENTIFIERS	*Dependents Schools

ABSTRACT

The case studies in this report analyze the issues surrounding possible transfer of 11 Section 6 school systems (federally run schools on military bases) to state and local responsibility. Each case study addresses the extent to which a site is ready for transfer and what type of transfer option might be appropriate to that particular site. An analytic framework that identifies factors affecting readiness for transfer and considerations affecting option suitability was applied to the specific information collected on each site from federal, state, local, and military base interviews. Suggestions are made as to how some of the impediments could be removed or ameliorated to facilitate a specific transfer option. The 11 case studies are presented alphabetically by state. Each of the state sections begins with a brief summary of the education program and state financing programs. These are followed by a discussion of specific transfer issues influenced by the state's policies and regulations. Case studies of the school systems begin with general background about the military base and surrounding community, followed by a discussion of transfer issues including the school district financial resources, condition of facilities, and base employee status after a transfer. (MLF)

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A RAND NOTE

Section 6 Schools in Six States: Eleven Case Studies of Transfer Issues

Susanna W. Purnell, Arthur E. Wise,
Susan J. Bodilly, Lisa Hudson

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Susanna W. Purnell, Arthur E. Wise,
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Prepared for the
Assistant Secretary of Defense
(Force Management and Personnel)

RAND

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PREFACE

The case studies in this Note analyze the issues surrounding possible transfer of 11 Section 6 school systems (federally run schools on military bases) to state and local responsibility. The studies describe the concerns of the parties involved, as well as identify the factors that facilitate or impede the transfer. The 11 schools are located on bases in six states: Maxwell Air Force Base (AFB), Fort McClellan, and Fort Rucker in Alabama; England AFB in Louisiana; U.S. Military Academy, West Point in New York; Fort Jackson, Laurel Bay, and Myrtle Beach AFB in South Carolina; Dahlgren Naval Surface Warfare Center and Quantico Marine Corps Base in Virginia; and Fort Stewart in Georgia.

This Note supplements R-3647-FMP, *The Transfer of Section 6 Schools: A Case by Case Analysis*, which provides an overview of transfer issues, as well as case studies of six Section 6 schools. The reader is urged to read the report before reading these case studies.

This Note should be of interest to officials at all three levels of government who would participate in any future transfer negotiations. In addition, leaders and interested members of the communities living on or adjacent to these military bases might want to read specific site studies.

The Office of the Assistant Secretary of Defense for Force Management and Personnel, Director of Dependents Support Policy, sponsored this research, which was undertaken in RAND's National Defense Research Institute, a federally funded research and development center supported by the Office of the Secretary of Defense and the Joint Chiefs of Staff. Within RAND, the Defense Manpower Research Center conducted the study in cooperation with the Education and Human Resources Program.

SUMMARY

This Note contains 11 case studies examining the factors affecting possible transfer of the federally run Section 6 schools to state and local responsibility. Financed and operated by the U.S. Department of Defense (DoD), Section 6 schools date back to a 1950 Public Law which enables the federal government to operate schools on military bases in communities that in the past were judged unable to provide suitable education to base children or that are prohibited by state law from expending tax revenue on base children's education. Located on 18 military bases in the United States and Puerto Rico, the Section 6 schools enrolled approximately 36,000 dependents in FY 1987, at a cost to the federal government of approximately $138 million.

During the past several years, elements of the federal government recommended transferring the 17 Section 6 school systems located in the United States as both a budget-saving action and on the philosophical grounds that the federal government should not be running local schools. In 1986, the Congress mandated that the Department of Defense develop a plan for the orderly transfer of the schools, not later than 1990. DoD responded by recommending analyses of site specific conditions at each Section 6 location and, as part of that effort, asked The RAND Corporation to analyze the issues posed by transfer using a case study approach. In July 1988, RAND published R-3647-FMP, *The Transfer of Section 6 Schools: A Case by Case Analysis*. Based on analyses of transfer issues at six base school systems, the report concluded that no school could be transferred without substantial initial and, in some instances, continuing cost to the federal government. In December 1988, the DoD concluded that transfer of the Section 6 schools was inappropriate at this time. During the three months which followed, key elements of the Congress agreed with this conclusion.

The 11 case studies contained in this Note complete RAND's survey of all 17 Section 6 schools located in the United States. The reader should be aware that the information contained in these case studies

does not necessarily reflect the current situation at each of the Section 6 sites because the analyses are based on data collected from field trips made in 1988. Moreover, the transfer of the Section 6 schools is no longer a current issue. However, the case studies provide a number of insights and a framework for analysis should the issue arise in the future.

The case studies were conducted using the same methodology described in R-3647-FMP. Each case study addresses two questions: (1) the extent to which a site is ready for transfer, and (2) what type of transfer option might be appropriate to that particular site. An analytic framework that identifies factors affecting readiness for transfer and considerations affecting option suitability was applied to the specific information collected for each site from federal, state, local, and military base interviews. Each case study identifies the factors at that site that facilitate or impede a transfer, as well as the most appropriate transfer options. Because there are impediments to transferring each of the Section 6 schools, suggestions are made as to how some of the impediments could be removed or ameliorated to facilitate a specific transfer option.

With the completion of the 11 case studies presented in this Note, all 17 Section 6 sites can be ranked by relative readiness for transfer. The purpose of establishing relative readiness is not to recommend transfer of specific Section 6 schools, but to identify the relative ease with which a transfer could take place. Although subsequent changes in personnel, policies, and environment could affect relative placements of specific Section 6 schools, the general approach could be applied to any future considerations of transfer. Section 6 schools can be grouped into five categories of readiness for transfer.

1. **No Section 6 profile:** Section 6 schools in this most ready category do not fit the usual Section 6 profile. Most Section 6 schools can be characterized by at least one of the following: a location in a rural community which is unable to support a relatively large base school population, or major

concerns regarding jurisdiction, desegregation compliance, or security problems. Schools in this category exhibit none of these characteristics. Moreover, adjacent local education agencies (LEAs) have an excellent academic reputation and there is substantial community support for education. This category includes Fort Jackson and the Quantico Marine Corps Base.

2. **Minor impediments:** This next category of readiness recognizes the advantage of a Section 6 school to military dependents, but finds no major impediments should a transfer be mandated. Myrtle Beach Air Force Base is the only school system in this category.
3. **Significant impediments:** The third category not only recognizes the advantage of a Section 6 school system but includes sites where significant impediments exist. However, should a transfer be mandated, solutions could be found. Most of the sites are included in this category because of impediments preventing LEA use of base facilities. This largest category includes Dahlgren Naval Surface Warfare Center, England Air Force Base, Laurel Bay, Robins Air Force Base, Fort Bragg, and West Point.
4. **Major impediments:** Impediments also exist in this category but they are relatively more difficult to overcome because they are, to some extent, endemic to the situation. Transfer could take place, but in all probability the impediments would remain. Sites included here are rural LEAs which would be swamped by large base populations or LEAs which continue to have difficulties with school desegregation or adequately funding education. They include Fort Benning, Fort Knox, Fort Stewart, and Maxwell Air Force Base.
5. **Prohibitive impediments:** In this least-ready category, existing impediments preclude consideration of transfer in the immediate future. Any eventual transfer of the Section 6 schools listed here depends on legal actions, such as new legislation or interstate agreements, or major changes in the

local environment. Three school systems--Camp Lejeune, Fort Campbell, and Fort Rucker--are in this least-ready category.

In addition to identifying the factors that influence readiness for transfer, the case studies identify the most appropriate transfer options should the status quo no longer be available. Five transfer options are considered.

1. **No transfer:** Maintaining the Section 6 school systems continues to be a viable option at all sites. Military dependents attending these schools receive a high-quality education in a system characterized by substantial parental support and input. Moreover, Section 6 schools are geared to the needs of the dependents, providing support services to help the students cope with the mobility and stresses of the military lifestyle. At Camp Lejeune, Fort Campbell, and Fort Rucker, impediments preclude any consideration of transfer.
2. **Contractual arrangement:** The federal government contracts with the LEA to operate and maintain the Section 6 school. The federal government retains some part of the financial burden, but is not involved in the direct operation of the school. The Section 6 school at West Point could be transferred under this arrangement.
3. **Coterminous school system:** The Section 6 school system is converted to a state public school system with boundaries coterminous with the base. Such a school district is eligible for state funds and federal Impact Aid funds, but has no local tax base. However, laws and regulations governing each state's education system make it difficult, or in some instances illegal, to establish a coterminous school district.
4. **Transfer to the LEA:** The Section 6 school system is incorporated into the LEA. The LEA is eligible for federal Impact Aid funds, but the LEA is primarily dependent on state and local revenues. Fort Knox, Fort Stewart, and Fort McClellan could be transferred to the LEA.

5. **Assisted transfer:** The base schools are incorporated into the LEA, but federal funds in excess of Impact Aid, or state funds, are available to ensure that the LEA is able to provide a suitable education to its students. This proposed option currently does not exist. Recent legislation allowing an LEA to receive federal Impact Aid and Section 6 funds might serve as the legal basis for this option. However, it is also possible that additional federal or state legislation would be required to implement the assisted transfer. The remaining ten Section 6 schools could be transferred using this option.

Of the four alternatives to the status quo, the assisted transfer option is the most appropriate for the majority of sites because it ensures that LEAs receive adequate compensation for their local contribution to the per-pupil expenditure. Legally, a transfer cannot take place unless a suitable education is provided, and this option provides the financing needed for the LEA to maintain the level of education services after a transfer. It is the conclusion of this study that transfer of the Section 6 school systems to some LEAs should not be considered until this or a similar funding device is in place.

In analyzing the case study outcomes, several other conclusions emerged. First, the circumstances at each site are different. In any future consideration of transfer, policy makers should determine the readiness for transfer and the appropriate transfer option on the specific merits at each site.

Second, from the base communities' viewpoint, some perceived drawbacks to a transfer cannot be removed. These include the loss of a school system geared solely to the needs of military dependents, loss of base parents' governance through the election of their own school board, and for most Section 6 employees, loss of federal employment.

In addition, the transfer of the Section 6 schools would not eliminate federal government responsibility for current and some future construction needs. In 1987, Section 6 facilities required over $93 million in unfunded capital improvements to meet federal and state capacity, safety, and legal standards. Local school districts make the federal funding of these needed improvements a precondition to transfer. Moreover, the federal government would continue to have responsibility for future capital needs if local school districts took over these facilities under a lease arrangement rather than through transfer of ownership.

Finally, it is impractical to include all of the factors and outcomes unique to each of the 11 Section 6 school systems in this summary. Readers will find a synopsis of the findings for a particular site at the end of each case study under the headings **Decision Summary** and **Options to Consider**.

ACKNOWLEDGMENTS

This study was made possible by the hundreds of school administrators, teachers, parents, state education administrators, and military base and local community officials who took the time to provide us with information and insight concerning each Section 6 school site. The authors thank them for their patience and hospitality in the face of still another review of the transfer issue.

The authors are grateful to Hector Nevarez, Director of Dependents Support Policy in the Department of Defense, and staff member Sheila Ford for their assistance and support throughout the study, as well as their useful reviews of the case studies. The authors also benefited from the helpful comments of RAND colleagues Glenn Gotz, who reviewed early drafts, and Paul Hill, who critiqued the final Note.

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I. INTRODUCTION

This Note examines the issues surrounding the possible transfer of 11 Section 6 school systems to state and local responsibility: the schools for dependents of Maxwell Air Force Base (AFB), Fort McClellan, and Fort Rucker in Alabama; England AFB in Louisiana; West Point Military Academy in New York; Fort Jackson, Laurel Bay, and Myrtle Beach Air Force Base (AFB) in South Carolina; Dahlgren Naval Surface Warfare Center and Quantico Marine Base in Virginia; and Fort Stewart in Georgia.

Financed and operated by the U.S. Department of Defense (DoD), Section 6 schools educate military dependents living on 18 bases in the United States. The schools are named after Section 6 of Public Law 81-874, 1950, which enables the federal government to operate and maintain schools in communities that in the past were judged either unable to provide a suitable education to base children or state law prohibited tax revenues of the state or any political subdivision to be expended for the free public education of military dependents living on bases. "Suitable education," however, has never been defined, nor have the standards for its determination been established. Located in nine states and Puerto Rico, the Section 6 schools enrolled approximately 36,000 military dependents in FY 1987, at a cost to the federal government of approximately $138 million.

Over the years, the size of the Section 6 program has varied. At one point, there were one hundred schools. However, most have since been transferred to the local education agency (LEA)--the local public school district. By statute, the Secretary of Defense and the Secretary of the military department concerned, after consultation with the appropriate state agency, must determine that the LEA can provide a suitable education before a transfer can occur.[1]

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[1] Section 6 schools were originally administered by the Commissioner of Education, so the law referred to his decisionmaking authority. However, the Secretary of Defense now administers the program and must take part in the transfer decision.

Periodically, Congress has reviewed the status of the remaining Section 6 schools to determine whether transfers are appropriate. In 1986, after the most recent review, Congress mandated that the Department of Defense develop a plan for the orderly transfer of the schools, not later than 1990. The mandate was based on philosophical and financial grounds. Education is considered the responsibility of the state and local governments; therefore, some argue, the federal government should not directly finance and administer schools. Furthermore, the transfer of the schools, it was thought, might result in savings to the federal government.

The Department of Defense responded to the congressional mandate by recommending analyses of site specific conditions at each Section 6 school system. As part of this effort, DoD asked RAND to analyze the issues posed by transfer using a case study approach. RAND report R-3647-FMP, *The Transfer of Section 6 Schools: A Case by Case Analysis,* July 1988, reviewed the factors influencing a transfer, constructed a framework for analyzing those factors in terms of specific Section 6 sites, and provided six case studies of Section 6 schools. The report concluded that no school could be transferred without substantial initial and general continuing cost to the federal government.

After reviewing the RAND report and conducting its own in-house analysis, the Department of Defense concluded that transfer of the Section 6 schools was not feasible at this time. In a letter to congressional leaders, sent in December 1988, the Deputy Secretary of Defense cited a number of reasons for this conclusion.[2] The Secretary noted that none of the parties to a possible transfer had demonstrated significant support for such an action. The letter stated that "the strong opposition of the local communities that would have to absorb our students, the grave concerns of our military parents that transfers would compromise the quality of their children's education, and the substantial economic, logistics and personnel problems associated with transfers prevent the amicable transfer of our students at this time." In response, Congress concurred that transfer of the Section 6 schools was inappropriate.[3]

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[2] See letter from Deputy Secretary of Defense William H. Taft, IV, to Chairmen of the Senate and House Armed Services and Appropriations Committees, December 30, 1988.

RAND'S FOLLOW-ON STUDY

At the request of the Department of Defense, RAND began conducting case studies of the remaining Section 6 schools in February 1988, completing the site visits in November 1988. Interim findings were provided to the sponsor; this Note contains the case studies of all 11 Section 6 schools in the study.[4] Information contained in these studies does not necessarily reflect the current situation at each site, but rather reflects the data available in 1988.

In the follow-on survey, RAND applied the methodology developed in the previous study. Taken together, the two studies highlight the factors at each of the 17 Section 6 sites that either facilitate or impede a possible transfer. Should a transfer be considered in the future, the case studies provide analyses of the factors to be considered at each site.

Because this Note completes RAND's survey of all 17 Section 6 school systems, this introduction summarizes the findings of the combined studies. First, there is a brief synopsis from the previous report of the major transfer issues and various options by which financing or operation of the Section 6 schools could be transferred to the state and local education agencies. There follows the conclusions emerging from the 17 case studies concerning the relative ease of transfer and best transfer option at each Section 6 site. The final subsection introduces the reader to the organization of the 11 case studies comprising the body of this Note.

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[3] Although Congress has given no formal notice that the schools should not be transferred, the Senate Armed Services Committee and members of the Subcommittee on Military Installations and Facilities of the House Armed Services Committee expressed their belief that transfer no longer would be considered at present. Moreover, key members of Congress, including some who had originally supported the congressional mandate, have announced opposition to a transfer, based on the negative impact that it would have on local communities. See letter from Deputy Assistant Secretary of Defense Barbara Spyridon Pope to Glenn A. Gotz, The RAND Corporation, March 14, 1989; "Planned Transfer of Military Base Schools Resisted," *Education Week,* December 14, 1988; U.S. Congress, Senate, *National Defense Authorization Act for Fiscal Years 1990 and 1991,* 101st Congress, 1st Sess., GPO, Washington, D. C., 1989, pp. 253-254; and *The Congressional Record,* House, November 13, 1989, p. H8369.

[4] The study did not include the Section 6 school located in Puerto Rico. Congress exempted that school from transfer consideration because of the different language used by the LEA and the base populations.

TRANSFER ISSUES

A number of considerations affect the relative ease with which the transfer of each Section 6 school system could take place. Although the circumstances at each site are unique, we were able to categorize specific considerations under more general issue headings. The following summarize clusters of issues pertaining to a transfer.

Quality of Education. One issue is how a transfer would affect the educational services currently provided by Section 6 schools. Personnel connected with the Section 6 schools and interviewed for the study stated their belief that the education program offered to the Section 6 children would decline if a transfer occurred. This perception is based on several arguments:

- Section 6 schools tend to be located in the southeastern United States where funding for education is low, and educational achievement indicators, while improving in recent years, are still the lowest in the nation.
- Section 6 schools offer education programs geared to the needs of military children, a highly transient population. Therefore, Section 6 schools are organized and staffed to handle the students' mobility and stress. In contrast to most LEAs, Section 6 schools offer more individualized pacing of course work, more counseling and timely placement, and more flexibility when state regulations would penalize transience.

- Section 6 schools have achieved a high level of school-community cooperation. On some bases (e.g., those with rapidly deploying units), the sense of community is highly valued by families and commanding officers.

Adequate Financial Resources. A major issue is the effect a transfer of base students would have on the LEA's ability to maintain or increase educational services. A number of factors are important.

First, it is important to examine the funding characteristics of the LEA. In most instances, the state and local governments would have to increase their own revenues to provide for base students' education and maintain the quality of education. Thus, one factor is the local tax raising ability. Rural counties in which the military base occupies a significant proportion of the land may have more difficulty raising revenue than metropolitan counties experiencing economic growth. A related factor is the willingness of local taxpayers to support education. For example, at some Section 6 sites, the county or the state has restricted the extent to which school budgets or taxes can be increased. In other LEAs, voters have a past history of defeating referenda for school construction or renovation. Finally, state and local funding formulas can influence the effects of a transfer. In at least two instances, existing state and county funding formulas would reward LEAs incorporating Section 6 schools while penalizing other school districts.

Second, it is important to identify what kind of funding accompanies Section 6 students after a transfer. State and local officials object to the fact that they are being asked to finance the education of students whose parents, for the most part, pay no state or local taxes. Military personnel pay no income taxes except to their declared state of legal residence, pay no property tax if they live in base housing, and pay no sales tax when they use the local Post Exchange or Commissary. On the other hand, military bases bring economic growth to communities in the form of jobs and needed services and this compensates for the presence of the base in the community.

The federal government does provide financial assistance to communities affected by a military presence. Impact Aid provides payments in lieu of taxes for the education of "federally connected children." Payments are made to the LEA on a per-child basis for two categories of students. In Category "A" are children whose parents work and reside on federal property such as military dependents living on the base. Category "B" includes children whose parents work or reside on federal property (but not both), such as military dependents whose parents work on a base but live in the local community. Because families of B students are more likely to contribute to the local tax base, federal payment for a student in the B category is lower than for the A category. If the Section 6 students were transferred to the LEA, they would qualify as category A students.

The Impact Aid funding formula is geared to the proportion of students in the A and B categories. LEAs in which A students compose more than 20 percent of the enrollment are known as Super A districts, and are paid a significantly higher per-pupil rate than Intermediate A districts (15 to 20 percent A enrollment) or Regular A districts (less than 15 percent). In 1988, the average Super A district qualified for a per-pupil payment of $1,823, compared to $1,368 for an Intermediate A or $565 for a Regular A district.[5]

In theory, federal Impact Aid payments could cover the local contribution toward the per-pupil expenditure (PPE), thus easing the burden on the LEA to maintain or increase the level of educational services after a transfer.[6] However, at 10 of the 17 Section 6 school sites, Impact Aid payments would not cover the local contribution. In fact, because local contributions and Impact Aid payments vary widely, a transfer of Section 6 students to the LEA could result in a windfall or loss in terms of the existing PPE. The appendix contains summary charts detailing the changes in Impact Aid status and the local funding base should the 11 Section 6 schools examined in this Note be transferred to neighboring LEAs.

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[5] Super B districts (over 20 percent B enrollment) qualified for $182 per pupil, compared to $30 for Regular B districts (20 percent or less B enrollment).

[6] Because Impact Aid funds go to the LEA, the state receives no compensation for its share of the per-pupil expenditure.

Finally, there is the issue of the long-term reliability of Impact Aid. Funding for the entire program has fluctuated over the years. During the Reagan Administration, both the Department of Education and the Office of Management and Budget advocated the elimination of the program. Congressional supporters have maintained the annual appropriations for the program but, in terms of real dollars, Impact Aid dropped by 40 percent from 1976 to 1986. Thus, state and local officials remain skeptical about the program's long-term viability. They prefer an arrangement that guarantees continued funding in the future.

Facilities. Transferring the current Section 6 facilities to LEA ownership or use is a major concern in any transfer agreement. None of the LEAs adjacent to Section 6 schools have the classroom space to accommodate all the Section 6 students. All require the use of base schools to educate base students if a transfer occurs. Moreover, base parents place a high value on maintaining their neighborhood schools on base, especially for elementary students. Therefore, major issues in a transfer include the legality of transferring the facility, the condition of the buildings, provision for LEA access, and future upkeep needs.

The optimum solution would be for the LEA to own and continue using the facilities on the base; however, a number of circumstances can make this difficult.

- Due to the perceived need to maintain control of the post, base commanders are reluctant to turn over parcels of land within the base perimeter. This attitude is even more pronounced when the base is closed and under heightened security measures.
- Most states require the LEA to either own the building or hold a long-term lease (usually 99 years), as well as have guaranteed access.

- Currently, many Section 6 school facilities have major capital outlay needs. State and local officials do not want to assume title if a building requires major renovation or does not meet state building codes.
- Legal impediments may also hamper LEA use of base facilities. Some states prohibit the expenditure of public funds on buildings not owned by the LEA. In other instances, LEAs have no authority to use facilities located on land under exclusive federal jurisdiction.
- If the base facilities cannot be used, it might be difficult to finance substitute facilities. Local taxpayers might not support a bond issue. Additional state or federal funding might be difficult to obtain.

Governance. The loss of political input into the education governance of their children's schools is often cited by base parents as a negative effect of a transfer. Currently, parents of Section 6 students qualify to vote and run for Section 6 school board elections. This school board is the policy-making body of each Section 6 school. However, because most base parents do not claim local county residence, they would be unable to vote or run for LEA school board elections. Base parents fear this would limit their influence over their children's education, especially in the provision of services geared to the unique needs of military dependents.

Jurisdiction. Determining which state and local education agencies take responsibility for educating the Section 6 students can impede a transfer. Education officials in two states claim the state has no responsibility to educate students on a military reservation under exclusive federal jurisdiction. Moreover, at five of the 17 Section 6 sites reviewed, more than one LEA may have jurisdiction to educate base children. In some instances, base housing is located in two counties or two states. In others, more than one LEA adjoins the base. Deciding between competing LEAs has repercussions for the financing and logistics of a transfer. Failure to reach an agreement for transfer to a single

LEA could result in dividing the base students and facilities among several LEAs. At some sites, existing state and local regulations provide a means for a negotiated, equitable determination of jurisdiction. At others, changing state law or negotiating multijurisdictional agreements are prerequisites to resolving the issue.

School Assignment. Incorporation of a Section 6 school into an LEA can result in new school assignments. For example, at some sites LEA officials would want to reassign LEA students in overcrowded schools to less crowded base facilities. Incorporating Section 6 students into an LEA still under court-ordered desegregation could also necessitate reassignment of base and LEA students. The base commanders, concerned about maintaining security and control over the post, generally oppose the idea of LEA students attending facilities on the base. Base parents at a few sites recalled past instances in which the LEA had bused base rather than LEA students to comply with court orders.

Employees. The staffs of the Section 6 school systems are all federal employees, for the most part under excepted service or annual contracts.[7] For most of these employees, the transfer of the Section 6 schools would mean a loss of job or change of employers. Although most LEA officials indicated they would hire much of the staff, changing employers could have financial and professional consequences, including lower salaries, new school or subject assignments, and loss of seniority. Long-term Section 6 employees would be unable to convert their investment in the federal government retirement program into the state system unless a transfer agreement incorporated a group buy-in option for the state retirement program. All of these factors could influence the ability of the LEA to hire the existing Section 6 staff. Base parents view the retention of the Section 6 staff as key to maintaining the quality of education after a transfer.

Indications of Transfer Readiness. On the basis of our research and analysis, we have developed an index of characteristics that suggest the relative ease of transfer at the various Section 6 sites. The indicators listed in Table 1 summarize the characteristics facilitating transfer. They include factors that might facilitate transfer, such as a low ratio of Section 6 enrollment to LEA enrollment, and the absence of factors that might impede transfer, such as a conflict between LEAs over jurisdiction. Failure of a Section 6 site to fit the ideal profile does not mean that the site could not be transferred. It only provides a relative yardstick of readiness. The closer a site is to this ideal profile, the easier the transfer.

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[7] The U.S. Army, the only service that uses annual contracts for employees of Section 6 schools, is changing to excepted service.

TRANSFER OPTIONS

A review of the current arrangements for educating children living on military bases revealed four options, representing various financing and operating approaches:

- **No transfer:** Maintains the status quo of continuing to operate the school under the Section 6 program. This is appropriate if the local situation conforms with the criteria of the public law--surrounding communities cannot provide a suitable education or there appears to be no other viable option.
- **Contractual arrangement:** The federal government contracts with the Local Education Agency to operate and maintain the Section 6 school. The federal government retains some part of the financial burden, but is not involved in the direct operation of the school. As in the case of the 17 Section 6 schools, funding is provided through Public Law 81-874, Section 6. Unlike the Section 6 schools, these base schools no longer have their own school board; rather, the LEA school board directs policy. Schools on six bases are operated through contractual arrangements.
- **Coterminous school system:** The Section 6 school system is converted to a state public school system with boundaries coterminous with the base. Such a school district is eligible for state funds and federal Impact Aid funds, but has no local

Table 1

INDICATORS OF READINESS FOR TRANSFER

Suitable program will be maintained

- State and LEA have high indicators of education quality
- Base parents view LEA as a quality school system
- LEA and Section 6 schools offer comparable programs
- LEA offers flexible approach for military children
- Parents' input will be welcomed by LEA
- LEA supports neighborhood school concept
- LEA is not forced to bus because of capacity problems

LEA and state financial resources are adequate

- LEA and state have high PPE compared to nation
- LEA has a sufficiently large tax base
- LEA has strong taxpayer support of education
- Impact Aid would cover LEA PPE contribution
- Impact Aid would be stable
- LEA has resources to provide same services as Section 6 schools

LEA and state other resources are adequate

- Low ratio of Section 6 enrollment to LEA enrollment
- Low ratio of Section 6 enrollment to LEA military dependent enrollment
- Reduced grade span in Section 6 schools
- LEA able to attract qualified staff after transfer
- LEA allowed time to plan for transfer

Facilities transfer is possible

- State law eases facilities transfer
- Section 6 facilities meet state codes
- Section 6 facilities are in reasonable condition or funds are available for needed repairs
- LEA has capability to maintain facilities: has adequate capacity in its existing schools, maintains existing property, and has adequate tax support for construction.

Base concerns are met

- Access of LEA to schools is not a problem: base is open, schools are located at perimeter of base or in one location, there are few Section 6 schools, LEA currently has access to base to pick up children, and other arrangements exist that can be copied.
- Traffic on or off base by LEA will be limited: LEA will agree to keep base children on base and not transport nonbase children onto base.

Governance by base parents is allowed

- State and local law allow base parent representation: can vote in school board elections and can run for school boards.
- Other means exist for representation

Relations between systems are favorable

- LEA currently educates some children living on base
- LEA historically educated children living on base

Jurisdictions are clear and nonconflicting

- State government accepts responsibility for educating base children
- Single state and county jurisdiction over base
- If two counties, one county is clearly favored for transfer

tax base and is no longer eligible for Section 6 funding. A coterminous school system is self-governing with its own school board. Schools on four military bases are operated under this arrangement.

- **Transfer to the LEA:** The Section 6 school system is incorporated into the LEA. The LEA is eligible for federal Impact Aid funds, but the LEA is primarily dependent on state and local revenues. The LEA is not eligible for Section 6 funds, and the federal government is no longer involved in the operation and maintenance of the schools. The LEA school board provides governance. In the history of the Section 6 program virtually all of the schools have been transferred using this option.

A review of the three alternatives to the status quo reveals a number of drawbacks, especially in the financing of the transfer. Initially, the coterminous approach appears attractive politically, because the base continues to run the school system and there is no adverse impact on neighboring LEAs. However, interviews with school officials of existing coterminous school districts indicate that obtaining adequate funding is a continuous problem. A coterminous district has only two sources of revenue: federal Impact Aid and whatever state funds are available to districts with no local tax base.* These generally provide a minimal operating budget and cannot cover major capital outlay needs, which are traditionally met through local bond issues. There is no political support at the state level for such an option; and, in many cases, this option would require a change in state law or action by the state legislature. Finally, not only is the funding tenuous, but most states are trying to consolidate existing school districts rather than add new ones.

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*In some states, school districts qualify for certain categories of funding on the basis of local tax levies.

A contractual arrangement also has drawbacks. In the past, the contracted LEA is no longer eligible for federal Impact Aid funds received for military dependents already being educated by the public schools. Federal legislation (Public Law 100-297) passed in 1988 could change this, allowing LEA to be funded by both programs. However, because the intent of the legislation was to provide LEAs only with short-term financial relief and the implementing regulations had not been published before this Note was prepared, it remains unclear whether such funding will be available to the LEA on a long-term basis. In a contractual arrangement, the federal government still funds a large portion of the educational costs, and base parents fear turning over their children's education to a contracting system geared to the lowest bidder.

Finally, although transfer to the LEA provides the broadest funding base, at most Section 6 sites transfer to the LEA would increase the demand for locally generated revenues. LEAs would not be able to fully recover local contributions toward the education of base students through federal Impact Aid funds. The result, in most cases, would be an increase in local taxes to make up the shortfall.

Because satisfactory financing is a key element in achieving a transfer that provides a suitable education, a new option needs to be developed to assure the receiving LEA that incorporating the base schools would not impose an undue financial burden. Federal or state legislation would be required to implement such an option, which is described as follows:

- **Assisted transfer:** The base schools are incorporated into the LEA, but federal funds in excess of Impact Aid, or state funds, are available to ensure that the LEA is able to provide a suitable education to its students. The federal obligation is reduced, but not removed. As in the case of a regular transfer, the federal government has no involvement in the operation of the schools which are governed by the LEA school board.

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The recent passage of Public Law 100-297 could provide the basis for a federally funded assisted option. As discussed above, until the implementing regulations are issued, it is unclear whether an LEA could receive Section 6 funds in excess of Impact Aid for more than a year. To be used as an assisted option, the law would have to permit a long-term, stable funding arrangement.

Table 2 summarizes the tradeoffs among the options.

OVERVIEW OF CASE STUDY ANALYSES AND OUTCOMES

With the completion of this follow-on RAND survey, case studies have been made of all 17 Section 6 school systems in the United States and some overview is possible.[9] In this subsection, we outline the analytical approach to the studies and the patterns that emerge when comparing the outcomes of all 17 studies.

Each case study addresses two questions: (1) the extent to which a site is ready for transfer and (2) what type of transfer option might be appropriate to that particular site. To accomplish this, an analysis of the factors determining readiness and indicating an appropriate transfer option were developed. The results of the analysis have been summarized above, factors affecting readiness appear in Table 1, and considerations affecting option suitability are summarized in Table 2. These general indicators were then applied to the information gathered for each Section 6 school system.

Readiness for Transfer. One goal of this study has been to rank the Section 6 school systems by relative ease of transfer. In R-3647-FMP, *The Transfer of Section 6 Schools: A Case by Case Analysis*, six school systems were studied and ranked by relative readiness for transfer. However, because these tended to be the largest school systems in the program, the relative standings were misleading in terms of the entire Section 6 program. With the completion of case studies

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[9] Case studies for Fort Benning and Robins Air Force Base in Georgia, Fort Knox in Kentucky, Fort Campbell in Kentucky and Tennessee, and Fort Bragg and Camp Lejeune in North Carolina can be found in R-3647-FMP, *The Transfer of Section 6 Schools: A Case by Case Analysis*, July 1988.

Table 2

TRANSFER OPTION EVALUATION

Consideration	No Transfer	Contract	Coterminous	Full Transfer	Assisted Transfer
Political					
Allows base commander influence	Yes	No	Yes	Reduces	Reduces
Allows parent participation in school board	Yes	No	Yes	Reduces	Reduces
Encourages parent and community support	Yes	No	Yes	Reduces	Reduces
Responsibility					
Increases state burden	No	Possible	Yes	Yes	Yes
Increases local burden	No	Possible	No	Yes	Yes
Reduces federal burden:					
Administrative	No	Yes	Yes	Yes	Yes
Financial	No	Possible	Yes	Yes	Yes
Financial					
Provides long-term stability	Yes	Yes	No	Yes	Yes
Provides for facilities upkeep	Yes	No	No	Yes	Yes
Reduces Impact Aid to others	No	No	Possible	Possible	Possible

for the remaining 11 Section 6 school systems, each school system can be placed in comparison to the other 16 Section 6 systems. The purpose is not to recommend transfer of specific Section 6 schools, but to identify the relative ease with which a transfer could take place.

Comparisons are made by using a common framework. Applying the characteristics listed in Table 1 as a yardstick for all 17 sites, each case study concludes with two lists of factors influencing the readiness or ease of transfer. The first itemizes the characteristics that are present at the site and therefore facilitate a transfer; the second lists the characteristics that are absent and therefore impede a transfer. For example, one factor listed in Table 1 is "jurisdictions are clear and nonconflicting." Thus, if a single LEA has jurisdiction over the base, it is characterized as a factor facilitating transfer. If, on the other hand, several LEAs make competing claims to jurisdiction, it is listed as an impeding factor.

Although the factors on these lists are not equally important to achieving a transfer, the approach serves to isolate the relevant issues and provide a point of comparison. As a result, each of the 17 Section 6 school systems can be placed in one of five categories of readiness. Although the complete list of factors identified in each of the case studies is not included in this introduction, the main impediment at each site is referenced in explaining the placement of the Section 6 school in one of five categories of readiness.

1. **No Section 6 profile:** This most ready category contains Section 6 schools located in environments that do not fit the classic Section 6 profile. The base is not in a rural area and the ratio of base to LEA students is relatively small. There are no major concerns regarding jurisdiction, desegregation compliance, or security. The LEA is supported by a healthy economy. Most important, the LEA has an excellent education reputation and provides excellent support to its schools. Section 6 secondary students, whose small number preclude a wide range of courses and opportunities, could benefit from a

transfer to the LEA. Quantico Marine Corps Base and Fort Jackson fall in this category.

2. **Minor impediments:** This next category of readiness recognizes the advantage of a Section 6 school to military students, but finds no major impediments should a transfer be mandated. Currently, this category includes only Myrtle Beach AFB.
3. **Significant impediments:** This third category not only recognizes the advantage of a Section 6 school system but includes sites where significant impediments exist. However, should a transfer be mandated, solutions to these impediments could be found. Most of the sites are included in this category because of impediments preventing LEA use of base facilities. England AFB, Robins AFB, and Dahlgren/NSWC contain facilities in highly secured, closed areas. Laurel Bay, a housing area, is also closed. The West Point facility cannot be used by the LEA because the federal government has exclusive jurisdiction and state law prevents it. There are various solutions in these situations. On the one hand, LEAs could assuage security concerns by assigning only base students to the base facilities. At the other extreme, a substitute school could be constructed off the base. Two other schools fall in this category. At Fort McClellan, three LEAs could have jurisdiction to educate the base students. However, state policies and good relations among the LEAs involved indicate that a satisfactory settlement of jurisdiction could be reached under current conditions. Finally, at Fort Bragg there are concerns about past LEA school assignment practices, organized resistance on the part of the base to any transfer, and a large number of facilities involved. These impediments can be resolved. The negotiated agreement with the LEA could include guidelines concerning school assignment and facility use.
4. **Major impediments:** As in the previous category, there are impediments at the sites included in this category. However, overcoming them is relatively more difficult because they are,

to some extent, endemic to the situation. Transfer could take place, but in all probability the impediments would remain. In the case of Fort Benning, students and facilities are divided between two counties. Most reside in a rural county which everyone agrees could not administer a school system the size of the base. The other county is urban but the LEA threatens to comply with desegregation guidelines by busing base students long distances rather than rezoning LEA school assignments. Fort Knox is a large, self-contained school system that would overwhelm either of the two rural county LEAs that would have jurisdiction. The LEA having jurisdiction at Fort Stewart cannot fund education at the level of the state's average per-pupil expenditure. The addition of the base students, even with Super A Impact Aid funding, which exceeds the local per-pupil contribution fourfold, would not change this situation. Maxwell AFB parents cite locally published articles detailing the problems the LEA continues to have in satisfactorily integrating the schools.

5. **Prohibitive impediments:** Finally, three schools are included in this least-ready category. Existing impediments preclude consideration of transfer at this time. Fort Campbell students and facilities are located in two states. At Fort Rucker, five LEAs are competing for jurisdiction over the base students. Transfer to a single LEA cannot be accomplished without reducing the funding available to other LEAs in the county. Moreover, some LEAs threaten legal action if they are not granted jurisdiction. At Camp Lejeune, the number of impediments make any transfer unrealistic. For example, there is extreme overcrowding in the LEA, a large backlog of capital funding, low support of education in the local community, a large physical impact should the sizable base school enrollment be transferred to an already overburdened system, and purported cases of racial discrimination in the local community. In all three instances, transfer might someday be considered.

However, they involve changes in the local community, legislation to change state and local funding distribution, possible court cases, and interstate agreements concluded between parties who prefer the status quo.

These categories illustrate how the framework developed for the case studies can help policy makers distinguish the difficulty involved in transferring specific sites. Table 3 identifies the Section 6 schools by the relative readiness for transfer if the status quo is no longer viable. It should be noted that the rankings reflect local circumstances at the time of the survey. Subsequent changes in personnel, policies, and environment could affect relative placements.

Appropriate Transfer Options. The second goal of the study has been to determine the appropriate transfer option for each site should the status quo no longer be viable. In the past, a single transfer option was recommended for all 17 Section 6 school systems.[10] However, the case studies in this Note demonstrate that each site is unique. The interaction of state policies with the specific characteristics of the LEA and the military installation provide a wide variety of scenarios. In any future consideration of transfer, policy makers should determine the appropriate transfer option on the specific merits of each site.

Based on the case study analyses, Table 3 identifies the best transfer option for each Section 6 school system. Three of the four alternative options to the status quo appear on the list. However, the fourth option--establishing a coterminous school district--turned out to be inappropriate at all the sites. The laws, regulations, and policies governing each state's education system make it extremely difficult or, in some cases, illegal to establish a coterminous school district.

The option emerging most frequently from the case study analyses is transfer to the LEA using the assisted option. Legally, a transfer

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[10] See United States General Accounting Office, *DOD Schools: Funding and Operating Alternatives for Education of Dependents*, GAO/HRD-87-16, December 1986, pp. 4-5. This report recommended that all 17 Section 6 schools be transferred using the coterminous option.

Table 3

RELATIVE READINESS FOR TRANSFER OF SECTION 6 SCHOOLS

Readiness	Best Transfer Option
No Section 6 profile	
Fort Jackson	LEA-assisted option
Quantico MCB	LEA-assisted option
Minor impediments	
Myrtle Beach AFB	LEA-assisted option
Significant impediments	
Facilities:	
Dahlgren NSWC	LEA-assisted option
England AFB	LEA-assisted option
Laurel Bay	LEA-assisted option
Robins AFB	LEA-assisted option
West Point	Contract
Other:	
Fort Bragg	LEA-assisted option
Fort McClellan	LEA transfer (assisted option depends on LEA choice)
Major impediments	
Fort Benning	LEA-assisted option
Fort Knox	LEA transfer
Fort Stewart	LEA transfer
Maxwell AFB	LEA-assisted option
Prohibitive impediments	
Camp Lejeune	
Fort Campbell	
Fort Rucker	

cannot take place unless a suitable education is provided, and this option provides the financing needed for the LEA to maintain the level of educational services after a transfer. Because this option does not exist at present, a major recommendation of this study is the establishment of the assisted option. It necessitates the continuation of a federal commitment in the form of Impact Aid and the creation of a new funding source. It has been suggested that, depending on the implementing regulations, Public Law 100-297 might serve as the vehicle for establishing an assisted option because technically the law allows an LEA to receive Section 6 funding as a supplement to Impact Aid. If this law cannot be applied to creating the assisted option, then federal or possibly state legislation would be required. It is the conclusion of this study that transfer of the Section 6 schools to some LEAs should not be considered until this or a similar funding device is in place.

All three transfer options present some drawbacks from the viewpoint of the base communities. For example, once a Section 6 school is incorporated into an LEA, military dependents would cease to be the sole focus of the school system. The base schools would be subsumed within a larger, less transient enrollment. The LEA has to operate under state guidelines, even if those regulations penalize transient students. The effects could be somewhat ameliorated if base students continued to attend the same base facilities, thus providing a more understanding peer group. LEAs could also allot some resources to serve base students' particular needs, for example, increasing the availability of guidance counselors for elementary students or speeding up placement procedures for midyear transfers.

Governance would also be affected. Base parents would no longer control their own school board once a transfer took place. In fact, lack of state or county residency on the part of most military parents would dilute any voter influence in an LEA school board election. Although nothing can replace the influence currently enjoyed by the parents of Section 6 school students, a transfer agreement could include provision for parental input, such as an ex-officio school board position for a base representative or parental advisory committees for the base schools.

All of the teachers and most of the staff would lose their federal employment if the Section 6 schools were transferred. Although the majority would be hired by the LEA, the conditions of that employment, such as a decrease in salary, could discourage some Section 6 teachers from pursuing employment in the LEA. One result of the transfer could be the loss of some of the Section 6 faculty.

Finally, even if the LEA took responsibility for running the schools, the federal government would have continued responsibility for the existing Section 6 facilities. These facilities currently require over $93 million in capital improvements to meet capacity, safety, and legal standards set by the federal and state governments. The LEAs will not accept any transfer that includes the use of these facilities unless the federal government first funds the needed repairs and renovations. In addition, the federal government might continue to be responsible for future capital improvements if the LEA used the facilities under a lease arrangement rather than through transfer of ownership. Therefore, although transfer of the Section 6 schools is advanced as a federal budget-saving measure designed to reduce costs in the defense budget, the military construction budget would have to fund present and some future capital improvements.

ORGANIZATION OF CASE STUDIES

The 11 case studies of Section 6 school systems contained in this Note are presented alphabetically by state. For each Section 6 site, there are two relevant sections. One provides information about state characteristics and policies that influence consideration of transfer. The other details the circumstances at each site.

Data for these studies were gathered from a number of sources and represent the most recent information available at the time of the field trips. The U.S. Departments of Defense and Education provided information on Section 6 budgets and number of students qualifying for Impact Aid in each LEA. At the state level, interviews were held with the state superintendent of education or his staff regarding state policies and preferences concerning a transfer. Information collected included funding formulas and LEA relative state rankings on a number of educational indicators. Similarly, at the local level, interviews garnered the viewpoint of public school officials in districts affected by a possible transfer. Interviewees included the superintendent, staff, representatives of the school board, and, in some instances, concerned citizens and elected officials. Local officials provided substantial information, including LEA salary schedules, enrollment statistics, school budgets, and local revenue sources.

Finally, interviews conducted at each Section 6 school solicited the views of the superintendent and administrative staff, as well as representatives of the teachers, school board, and parents. Each Section 6 staff provided detailed information concerning salary schedules, enrollment statistics, and other relevant data. At each military post, the base commander or chief of staff met with the RAND representatives to identify any security concerns about transferring facilities or granting access to an LEA, as well as how a transfer might affect morale or base-community relations.

Each of the state sections begins with a brief summary of the education program and state financing programs. These are followed by a discussion of specific transfer issues influenced by the state's policies and regulations, such as the state's position on accepting responsibility for educating children living on a military reservation. Because state policies and regulations prevent implementing the coterminous option at most sites, each state chapter identifies the impediments to that option. Other issues discussed are state requirements for LEA use of a facility, state contributions to purchase of buses and student transportation, and state laws concerning voting and running for the school board. State rules also affect a cluster of issues related to the Section 6 school system employees, including transfer of tenure and seniority, legality of collective bargaining, and feasibility of state teacher retirement fund buy-ins.

Case studies of the 11 Section 6 school systems begin with general background about the military base and surrounding community, the history of the Section 6 school system, and a description of all LEA candidates for a transfer. There follows a specific discussion of transfer issues, including the relative size of the Section 6 and LEA school populations, the condition of facilities and arrangements under which an LEA could use a base facility, LEA financial resources, base parents' opportunities for school board representation, the effect a transfer would have on school assignment on the base and in the LEA, and employee status after a transfer. As with the discussion of state policies affecting employees, this section incorporates LEA rules and negotiating positions toward a cluster of employee-related issues, including job security, transfer of seniority, comparable salary, and benefits. Finally, because each site is unique, each case study discusses any other issues related to transfer.

Finally, the two outcomes of each case study are contained at the end of each Section 6 school system discussion under the section headings of **Decision Summary** and **Options to Consider**. The first contains the two lists of factors influencing a transfer--those which facilitate and those which impede. The last section identifies the best alternative option to the status quo and suggests provisions that might be incorporated into a transfer negotiation to ameliorate at least some of the impediments identified in the **Decision Summary**. Those who do not wish to read the entire case studies can get a synopsis of the relevant factors and outcomes by reading only the last two sections of each case study.

II. THE STATE OF ALABAMA

Alabama, like other southern states, rates below average on available indicators of educational effort and quality. In 1986, the Alabama average per-pupil expenditure was $2,565; the national average was $3,752. This places Alabama 47th in per-pupil expenditures, and 43rd in education expenditures as a percent of income. Its high school graduation rate is 37th in the nation.

EDUCATION PROGRAM

The Alabama Minimum Program Fund sets minimum educational program requirements and appropriates funds to meet these requirements. In recent years, Alabama, like other southern states, has taken steps to improve education. In the current year, statewide kindergarten has been mandated; in future years, the pupil/teacher ratio will be gradually reduced. Funding for the Minimum Program has, however, often been inadequate. In 1987, for example, the legislature did not appropriate funds for the purchase of the following items originally included in the Program: mathematics, computer, and science equipment, and vocational equipment. Some local education agency superintendents express doubts about the legislature's ability to provide funds for future improvements, such as the reduced pupil/teacher ratio.

In addition, the state has a number of other mandates. State accreditation of schools requires minimal standards for school curriculum and personnel. Students are tested at grades 1, 2, 4, 5, 8, and 10, and all students must pass a competency test in reading, mathematics, and language prior to high school graduation.

SCHOOL FINANCING

Alabama education is financed mainly by state government. On the average, the state contributes 67 percent of all education revenues, primarily from income and sales taxes. The Public School Fund, created by the state constitution and distributed on a per capita basis, represents a small part of the state contribution. The largest source of state support is the Minimum Program Fund, appropriated annually by the state legislature. The Minimum Program Fund is distributed among local districts based on average daily attendance (ADA), using a funding formula that converts ADA to teacher units (based on a 28:1 pupil/teacher ratio). Almost all of the state funds are categorical; that is, funds must be spent for specific purposes. State funding follows the child to the public school district in the state that he or she attends.

Local funding is derived from several sources. On the average, only 22 percent of school financing comes from local sources. The major sources of revenue are local property (ad valorem) and sales taxes, which account for almost three-quarters of the local contribution. Other sources can include gasoline, liquor, and other taxes, as well as appropriations from county or city general funds. Countywide taxes for education are prorated, according to ADA, among the school districts, including all independent city school systems within the county. City taxes, on the other hand, apply only to the city school district.

Capital outlay needs are primarily the responsibility of the local government. The state does provide a nominal amount ($58 per teacher unit) for capital improvement, but this does not even cover maintenance. On occasion, the state provides capital improvement funds through a bond issue. However, the last such bond issue was in 1984. For the most part, LEAs are dependent on local bond issues or local government obligations to raise money for major construction needs.

The state also provides funds for the maintenance and operation of transportation, but does not fund the purchase of school buses.

STATE POLICIES AND SECTION 6 SCHOOLS

There are three Section 6 school systems for elementary students located in Alabama--Maxwell Air Force Base, Fort McClellan, and Fort Rucker. Secondary students living on these bases attend local school districts. State policies influence a number of issues related to the transfer of these Section 6 schools to local control.

Jurisdiction. Alabama recognizes its responsibility to educate all children residing within the state. The state would provide its share of funding to districts assuming responsibility for Section 6 students. The state is already providing for the education of secondary students residing on the three bases.

While there is no dispute over the state's jurisdiction, there is disagreement at two bases concerning which LEA would have the responsibility for base students. At both Fort Rucker and Fort McClellan, base secondary school students have the choice of attending several LEAs. This has resulted in some controversy concerning which local district would assume control of the base elementary schools, given a transfer.

The state provides little guidance in this matter; state officials will not assign responsibility for the base students to a specific LEA. The disputes involve county versus city school districts, and state officials believe the county would have to approve the final arrangement. However, this does not preclude city school districts from assuming responsibility for the base schools. State officials point out that many arrangements exist throughout the state that allow students to cross district lines. Many of these arrangements are based on students' geographic proximity to schools in other districts. State officials believe that the base schools represent unique situations and that selection of an LEA will be determined on the basis of LEA location and ability to absorb the extra students. Whatever the outcome, the state position is that local jurisdiction must be determined by local negotiation. Base students will attend an LEA by local arrangements.

Financial Burden. State officials are concerned that LEAs be adequately compensated by the federal government, either through Impact Aid or some other mechanism, for educating base students. State leaders might request some compensation to the state as well. This is because the state's Minimum Program Fund is a set, appropriated amount, distributed by ADA. Transfer of all of the Section 6 students would raise the ADA of the receiving districts and would, therefore, either force an increase in state appropriations or result in a redistribution of existing funds at the expense of the state's other school districts.

Coterminous Option. Unlike other states in this study, Alabama continues to add new school districts. An Alabama statute provides for the creation of independent districts. To qualify, a city must have a population of no less than 5,000 and levy a minimum revenue. New districts are being created under these guidelines, with the result that there are now 62 city school districts, a number approaching the state's 67 county school districts.

Despite this proliferation of districts, the three Section 6 school systems could not qualify as independent school districts. A base school system would have no tax-levying capability and state officials stated they would be unlikely to accept Impact Aid as an equivalent revenue source. Thus, special legislation would be required to create a district. State leaders also are not likely to support such legislation, in part because they would perceive it as more expensive to create a new district than to consolidate the base schools with existing LEAs. For these reasons, the coterminous approach does not appear to be a likely option in Alabama.

Facilities. Alabama LEAs can use the base facilities. Although state officials would prefer that the LEA own the buildings, a long-term lease arrangement is feasible. However, state officials believe that the law might prohibit LEAs from making building improvements on facilities they do not own. In addition, the state would want the base facilities to meet building codes and minimum acreage requirements. For elementary schools, these are five acres, plus one acre for every 100 students.

Employees. A number of state policies and benefit programs influence the conditions under which Section 6 teachers might enter LEA employment.

Years of Experience and Tenure. Local school districts would have discretion in determining how many years of experience would be credited to the Section 6 teachers. This is important because it influences determination of tenure and salary.

Tenure can be obtained in two ways. First, LEAs can grant tenure after a teacher has completed three years and been hired for a fourth. Second, teachers transferring into a school district can be granted immediate tenure if they have five years of teaching experience in public schools. LEA determinations about crediting years of experience in Section 6 schools would play a significant role in determining whether experienced teachers will have to wait before attaining tenure.

The decision on tenure also affects salary, because most Alabama school districts maintain two schedules: a lower-paid schedule for nontenured teachers, and a higher-paid schedule for tenured faculty.

Benefits. The state funds health/medical coverage, and employees can opt to participate in a number of supplemental programs, such as dental insurance. The state provides a $15,000 life insurance policy.

The state also operates a retirement program. Employees are required to contribute 5 percent of their gross salary to the Teacher Retirement System. The state matches this amount with another 7.57 percent. Individual buy-ins to this program are very expensive. A group buy-in would require special legislation and would not be financed by the state of Alabama.

Unions. Alabama law prohibits collective bargaining.

Transportation. Because Section 6 schools now contract out their transportation needs, and Alabama does not finance the initial purchase of a bus fleet, providing transportation could be a substantial up-front cost for any LEA accepting Section 6 schools.

Governance. County and city school districts have different selection processes for constructing their school boards. City school boards are appointed by the city council; county school boards are elected. In addition, about one-third of the county school superintendents also are elected. Voters must be state residents, but there is no specific time requirement attached to the residency qualification.

Alabama school boards have limited authority. They approve school budgets, but cannot levy taxes. Revenue raising authority resides in the local county and city governments. The only other recourse is to obtain voter approval for tax increases.

III. MAXWELL AIR FORCE BASE, ALABAMA

BACKGROUND: MAXWELL AIR FORCE BASE

Maxwell Air Force Base was established in 1910 as an Army air base. It served as a pilot training base during World War II, and is now the headquarters of the Air University, the Air Force's center for professional military education. The components at Maxwell AFB include the Air War College for senior officers, the Air Command and Staff College for mid-career officers, the Squadron Officer School for company grade officers, and the 3800th Air Base Wing. Other Air University organizations at Maxwell are the Ira C. Eaker Center for Professional Development; the Center for Aerospace Doctrine, Research, and Education; the Air University Library; and the Headquarters of the Civil Air Patrol-USAF.

The base mission influences the characteristics of the military assigned to Maxwell. The base has a high proportion of officers; currently, 30 percent of base personnel are majors or above. There is also a high turnover rate among student officers, whose tour of duty is ten months. This rate is expected to increase, as some courses of instruction are being converted from 10 to 5.5 months. However, Air University instructors typically serve a much longer tour of duty, from three to four years.

There is another Air Force installation in Montgomery. Gunther Air Force Station (AFS), located about five miles from Maxwell AFB, is related to Maxwell through a shared mission and administration. For example, Gunther AFS houses three components of the Air University, and the two installations have a joint payroll. However, military dependents living at Gunther AFS have never been part of the Maxwell AFB Section 6 school system. For the purposes of this study, Gunther AFS is a separate entity, having little impact on the circumstances discussed below.

Geography and Economy. Maxwell AFB is located on 2,535 acres in Montgomery County, on the northwestern edge of the city of Montgomery, Alabama. Approximately 4,000 military personnel with 3,187 dependents are assigned to the base. The base also employs 2,039 civilians.

The base contributes substantially to the local economy. The 1987-88 net annual payroll for Maxwell and Gunter was $241.4 million, with $80.7 million of that payroll supporting civilian personnel. In addition, base officials note that in 1987-88, Maxwell AFB expended $40.5 million in the local area.

History of the Section 6 School. The Maxwell AFB Elementary School was established in 1963, in response to segregation in the local schools. Since its founding, kindergarten and special education have been added to the school's curriculum. The current Maxwell school enrollment numbers 526 students in kindergarten through 6th grade. Close to 40 percent of the student body resides in Maxwell Heights, a base housing area for enlisted personnel, located approximately 1.5 miles from the main part of the base.

BACKGROUND: MONTGOMERY COUNTY

Geography and Economy. Although Montgomery County covers 793 square miles in south-central Alabama, about 90 percent of the county population resides in the capital city of Montgomery. In 1986, the county had a population of 215,400, a 9.3 percent increase over the 1980 census. County school officials forecast the area will be "stable to slightly growing" in the near future.

Montgomery area economic growth has been slow, but has been assisted by the presence of the state capital. Montgomery City is a center for furniture manufacturing, in addition to serving as the seat of state government. However, agriculture remains the major economic base of the county, with extensive livestock markets and dairy centers.

Montgomery School System. The Montgomery school system is a combined city-county system enrolling over 36,000 students; it is the fourth largest school system in Alabama. The system has 51 schools, including two educational centers and four schools for special students.

FACTORS INFLUENCING A TRANSFER

The following discussion describes factors relevant to a determination of possible transfer options. Table 4 compares basic characteristics of the base and LEA school systems.

School Population. Montgomery schools educate about 80 percent of the military dependents in the area. In 1987, approximately 2,425 military students attended county schools, including off-base military dependents, dependents living on Gunther AFS, and 7th through 12th graders living on Maxwell AFB.

Although Montgomery educates most of the military dependents, the actual impact of these students on the county enrollment is small. Currently, military students make up less than 7 percent of the county's student population. The transfer of the Maxwell AFB Section 6 students would increase the number of military dependents to only 8.3 percent of the total county enrollment. Montgomery County, therefore, would have little difficulty absorbing the Maxwell dependent school population.

Table 4

MAXWELL AFB AND MONTGOMERY COUNTY SCHOOLS

Characteristic	Maxwell AFB	Montgomery County
Enrollment (1987-88)	526	35,320
Ratio (Maxwell to LEA)	1:67	
Grade span	K-6	K-12
Number of schools	2	51
Elementary	1[a]	32
Middle/junior high	0	8
High school	0	5
Other	0	6[b]
PPE (FY 1987)	$3,395	$2,872
Pupil/teacher ratio	15.5	18.9

SOURCES: Alabama State Department of Education, *LEA Financial Status Report*, January 29, 1988, and data provided by the Office of Dependents Schools, Department of Defense.

[a] One campus with two facilities.

[b] Two vocational centers and four special schools.

Interaction Between School Systems. Because Montgomery County is responsible for providing education to base students in grades 7 through 12, there are a number of interactions that might facilitate a transfer.

First, LEA buses already come on the base to transport the 7th through 12th graders. Neither Montgomery nor base officials have ever had any problems with this arrangement, even though Maxwell is a closed base. Furthermore, neither party foresees any access difficulties if a transfer of the Maxwell Section 6 school necessitates increased LEA busing of base students.

Second, some military parents are already active in the Montgomery school system. LEA officials cited the extensive volunteer work of Maxwell parents, such as judging science fairs, leading computer training workshops, and tutoring ESL students.

Third, the base school and Montgomery County cooperate in making students' transition from 6th to 7th grade as smooth as possible. The Maxwell staff provides parents with information about the Montgomery schools and Maxwell 6th graders visit Carver Junior High School, the LEA school most Maxwell students attend.

Finally, the Montgomery district has previously offered to educate the Maxwell elementary students; they are still willing to assume this responsibility.

Facilities. The Maxwell Section 6 school is a campus of several buildings, including an elementary school for grades 1 through 6, a new primary school for kindergarten classes, two relocatables for additional classes, and a storage warehouse. The Department of Education owns the elementary school, but the new primary school building was constructed with Department of Defense funds. In addition, the relocatables and warehouse are owned by the Air Force. All buildings are in good condition, but are insufficient for current and projected enrollments. As a result, the school superintendent has requested $50,000 to expand the kindergarten building, and $538,500 to replace the temporary buildings with additional classrooms and a computer lab. Also, $50,000 has been requested to expand the warehouse. Funds for these construction needs have not yet been appropriated by Congress. The base school will be overcrowded until these construction needs are met.

Montgomery County schools are also overcrowded. The student population increased by about 1,000 in 1986, and another 300 in 1987. LEA officials project the school enrollment will be stable to slightly growing over the next five years. Currently, plans are being drawn for three new elementary schools. Long-term construction needs include a new high school and additional elementary facilities.

Ownership and Operation of Base Schools. Given the overcrowded conditions, the county would like to use the existing base school facilities in the event of a transfer. Further, the county is willing to accept the facilities without the needed expansions. Base leaders are amenable to a transfer of ownership if, as explained below, the facilities could be moved off-base.

Transfer of the existing facilities is greatly simplified by the fact that the buildings are located on an extreme edge of the base; the wing commander agreed that the base could simply move the fence along the base perimeter--in effect, moving the schools off-base by moving the base boundary in. This would eliminate base officials' security concerns, but would increase the number of on-base students who would require transportation to school, since all of the students would have to be bused around the fence. This would place an additional financial strain on the LEA. Currently, the base uses three buses to transport 150 students. If all base students were transported, the LEA could require as many as 11 additional buses. At $30,000 per bus, this could cost Montgomery County an additional $330,000.

Also, parents perceive that this arrangement would separate the school from the base community. For example, moving the school off-base would prevent or make more difficult the use of the facilities for other activities; currently, the school facilities are used for meetings by scout troops, Sunday school classes, and Air Force Junior ROTC.

LEA Financial Resources. Montgomery County's educational financing is below that of the average Alabama school system. The county's $2,716 per-pupil expenditure places it 42nd in percentile rank within the state, below the state average of $2,906. In 1985-86 the county's total educational revenues were $90,142,083, with 14.3 percent coming from local sources, 66.9 from the state, 13.5 from the federal government, and 5.2 from other sources (e.g., fees, donations, local trust funds).

Local revenues are derived from a variety of sources, including property, sales, and gasoline taxes. The city also contributes general funds. Because the school board does not have the authority to raise taxes, Montgomery officials must request funds from city and county general funds, or ask voters to approve tax increases, in order to raise local revenues for education.

The result is that school financing has remained fairly static. For example, teacher salary schedules were not increased between 1984-85 and 1987-88, a period when teachers' salaries across the nation were on the rise. Nor have voters supported tax increases for education. An April 1987 referendum to increase educational support by raising the property tax was defeated, even though, as a local newspaper pointed out, Montgomery has the lowest property tax among comparable cities in Alabama.[1] In short, local support for education is not strong; no one we spoke with seemed to think this situation would change dramatically in the near future.

Given this situation, Federal Impact Aid becomes an important factor in determining the LEA's ability to accept the transfer of the Section 6 schools without an adverse impact on the quality of education offered. As has been the experience of other LEAs, Montgomery County officials are uncertain about the future Impact Aid funding levels. This uncertainty is reflected in the proposed LEA 1988 budget, which noted that Impact Aid funds for the year could range from as much as $1.35 million to as little as $300,000. Because Montgomery County already educates military dependents living on the Maxwell and Gunther Air Force installations, the county qualifies as a Regular A district. The transfer of the Maxwell Section 6 students to the county would not change that Impact Aid status. Thus, Montgomery would continue to be eligible for the lowest allotment of Impact Aid in the A category.

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[1] See "We Can't Hide," *The Montgomery Advertiser,* May 31, 1988.

Under 1987-88 federal guidelines, a school district would qualify for $629 per Regular A student. However, several LEAs have reported to us that they are actually receiving a much lower amount. In 1987-88, Montgomery County's local contribution was about $602 per student. It is questionable, given the downward trends in Regular A payments, whether Impact Aid would cover Montgomery's local contribution.

School Board Voting and Representation. Selection of the Montgomery County School Board currently is being converted from an at-large election to a seven single-member district election. The change is the result of a statewide lawsuit that challenged the at-large election system as unfair to blacks. In fact, under the at-large system, two of Montgomery's seven members are black. The new plan creates three predominantly black districts.[2]

To vote in Montgomery elections requires residency but no waiting period, thus allowing base parents who are Alabama residents to participate in school board elections. However, most base parents maintain out-of-state residency and, therefore, could expect to have little influence in a school board election.

Should a transfer occur, Montgomery County does provide alternate means of parental input. LEA officials noted that, until several years ago, Maxwell's education officer had been attending school board meetings. In that tradition, LEA officials indicated they would consider recommending an ex-officio board position for a base representative. Maxwell parents would also have access through their local school PTA since a school board member attends those meetings. In addition, parents are encouraged to participate in a number of LEA activities, including the curriculum in-service council, the textbook committee, and the volunteer program.

School Assignment. One of the major concerns voiced by base parents was what impact a transfer would have on school assignment. Base parents would like their children to continue to attend the same base facility. However, parents suggest two factors could result in reassignment to other schools. First, residents of the Maxwell Heights base housing area are geographically closer to another county elementary school than to the existing base facilities. Second, Montgomery County currently is readjusting its policies in an effort to bring to a conclusion a 24-year-old federal court order for desegregation.[3] Base parents feel this might lead to changes in the composition of the base school.

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[2] See Kristin Francis, "Magistrate Says to OK School Plan," *The Montgomery Advertiser*, April 13, 1988.

Montgomery County officials have responded to these concerns by stating that if a transfer occurred, all of the base students, including those from Maxwell Heights, would continue to be assigned to the base school. LEA officials do not believe compliance with the federal court order would necessitate any change in the base dependents' school assignment, but these officials could not guarantee it would not affect it. The Maxwell Section 6 school enrollment is 36 percent minority, compared to the 58 percent in the county. However, the racial balance at specific schools varies widely throughout Montgomery County.

Parents responded that the county's approach to desegregation, under the federal judge's 1974 desegregation plan, would ultimately change base school assignments. The county operates under a majority-to-minority transfer option, which allows students attending a school where their race is the majority to transfer to a school where their race is a minority. Under the court's plan, the LEA also has established several magnet schools at predominantly black high schools, in an effort to encourage white students to desegregate those schools by exercising the transfer option. Maxwell parents argued that the base school with its excellent academic reputation is likely to attract a number of additional students using the transfer option, and that, ultimately, the reassignment of some base students would become necessary.

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[3] The Montgomery School Board is trying to settle the 1964 class action suit, *Carr vs. the Montgomery Board of Education,* with the goal of ending federal intervention within the next three years. A controversial proposal to achieve this goal includes the creation of three more magnet schools, continued court monitoring of student and faculty racial composition at individual schools, and the reassignment of some principals to promote integration at the administrative level. See Bob Forbish, "Transfer Program Not Cure-all for Segregation," *The Montgomery Advertiser and Alabama Journal,* April 10, 1988.

Employee Status. The Maxwell school employs 54 people, including 34 teachers holding state certificates, eight teachers' aides, four administrators, and eight support staff members. Maxwell AFB teachers and teacher aides are employed under excepted service contracts; most other support staff are employed on a wage grade schedule. These Maxwell school employees would be subject to a number of changes in employment status and conditions if the base school were transferred to Montgomery County.

Job Security. Montgomery County would try to hire all the Maxwell staff if a transfer occurred. However, even if employed by the LEA, it is doubtful that everyone would be assigned to the Maxwell school. Montgomery County is under a court order for teacher desegregation, and this is likely to necessitate the reassignment of some of Maxwell's staff to other county schools. The percent of black teachers in county schools is 40 percent; at Maxwell it is 15 percent.

In addition, some support personnel (e.g., guidance counselors, speech therapists) and specialty-area teachers (e.g., art, physical education) might also be reassigned, as LEA officials were unclear whether the Montgomery Elementary School staffing levels in these areas match those at Maxwell. For example, the county does not have a speech therapist in each school, but uses an itinerant therapist. In some instances, comparable job openings may not exist for support staff.

Years of Experience and Tenure. LEA officials would make no comments concerning what policy the county would apply in recognizing Maxwell teachers' years of experience or granting tenure. They view these issues as part of the negotiations for a transfer.

Salary. As Table 5 shows, teacher salaries are $1,600 to $3,000 higher at Maxwell than in Montgomery County, with the difference largest for new teachers, less for teachers with a few years of experience, but increasing as years of experience increase between 10 and 15 years. The Maxwell schedule levels off at 15 years of experience, nine years sooner than the county's pay schedule. Even after this point, however, the

Table 5

COMPARISON OF 1987-88 SALARY SCHEDULES FOR MAXWELL AFB AND MONTGOMERY COUNTY SCHOOLS

Salary Scale Level	Maxwell AFB Teachers' Salaries ($)	Montgomery County Comparison ($)
Bachelors degree		
0 years (untenured)	$21,229	-$3,046
9 years (tenured)	23,207	- 1,975
12 years (tenured)	23,770	- 2,391
Masters degree		
0 years	23,637	- 2,962
9 years	25,628	- 1,612
12 years	26,195	- 2,032
Masters degree + 30 hours		
0 years	25,237	- 3,110
9 years	27,240	- 1,632
12 years	27,960	- 2,205

base pay schedule remains higher than the highest level of the local county schedule. Thus, if hired on the Montgomery schedule, all base teachers would be subject to a decrease in pay.

LEA officials also indicated that negotiations would cover whether Maxwell teachers would be hired under the Montgomery pay scale or under an accommodation to lessen the difference in salaries.

Benefits. Montgomery school employees participate in a state-funded medical plan and are given the option of participation in supplemental plans for dental, vision, indemnity, and cancer coverages. Maxwell teachers we interviewed felt that Montgomery's health plan may be better than that offered by the federal government. In addition, Montgomery pays the premiums on a small life insurance policy for each employee.

Montgomery employees also participate in the State Retirement System. Each employee pays 5 percent of his or her salary and the state matches that with 7.57 percent. Any arrangement for Maxwell teachers to buy credit for past years would have to be determined at the state level.

OTHER CONCERNS OF THE PARTIES INVOLVED

Two other issues were discussed as important factors affecting the base school's readiness for transfer: the quality of education in the local school system, and the effects of a transfer on base morale.

Quality of Education. Base parents expressed particular concern that Montgomery County schools do not reflect the educational needs of the military community. Arguments echo those set forth by parents at other bases.[4] These concerns are heightened at Maxwell because the base attempts to recruit the top five percent of Air Force personnel for its professional education programs--a group that tends to be highly concerned with their children's educational conditions and opportunities.

A major concern of all base parties is the availability of adequate funds to maintain existing standards of education should Montgomery County assume responsibility for the Section 6 school. Base parents and teachers perceive the base school as a place where teaching supplies, support staff, and other resources are more readily available; in contrast, they view the local school system as one where these resources are limited. In addition, they note that supplemental programs (art, music, etc.) are better staffed in the base school, and that support staff are also more available. The local schools, they feel, are already underfunded; adding the base students to this system will only increase the burden.

These concerns are reinforced by the high degree of transiency at Maxwell AFB. The base school has an annual turnover rate of 50 percent. Base parents and faculty, therefore, argued the importance of students attending a school that is adapted to this type of population--with appropriate and efficient placement services, testing, counseling, and peer support. These services and resources are less available in the local schools.

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[4] See Susan Bodilly, Arthur Wise, Susanna Purnell, *The Transfer of Section 6 Schools: A Case by Case Analysis,* The RAND Corporation, R-3647-FMP, July 1988, for discussion.

The Maxwell AFB school board and parents also expressed concerns about the perceived difficulties Montgomery County is having promoting integration in the public schools. The publicity generated by efforts to resolve the LEA's 24-year old desegregation order led to a reexamination by the local press of how successful that effort has been. Articles in the *Montgomery Advertiser and Alabama Journal* express a perception that the federal court's desegregation plan has not been entirely successful.[5] The employment of the transfer option and magnet schools was designed to promote integration while preserving neighborhood schools and avoiding busing. However, the instigators of the court suit perceived that the result has been an exodus of white families from predominantly black, west Montgomery and from public schools altogether. In 1975, the white-black ratio in Montgomery schools was 60-40. One year later, it had shifted to 52-48. Currently, blacks outnumber whites 57-43 percent. In terms of the individual schools, 18 of 47 have black enrollments of 78 percent or higher. White enrollment in Carver High School, a magnet school which Maxwell base secondary school students attend, has declined from 40 to 15 percent.

Many county students have enrolled in private schools. In September 1987, an estimated 15.7 percent of the county's students attended private academies,[6] 1.5 times the national average. This has had two negative effects on the local public schools. First, the private schools serve as "segregation academies," making it virtually impossible for the county to become fully integrated. For example, nine of the county's 26 private schools have all-black enrollments; of the remaining 18 schools, black enrollment averages 5 percent. Second, private schools undermine support for the public schools, as parents with students in private schools have little motivation to spend tax dollars on public education.

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[5] *The Montgomery Advertiser and Alabama Journal*, April 10, 1988, and May 22, 1988.

[6] *Ibid.*, May 22, 1988.

Finally, base parents noted that, as a result of concerns about educational quality in the Montgomery schools, many Maxwell AFB secondary students attend private schools. There are no data available that identify where base secondary students attend school. However, the fact that a significant number of base parents are willing to pay tuition costs ranging from $500 to $3,800 indicates the extent to which base parents lack confidence in the public schools. Parents we interviewed stated that this alternative would be utilized for base elementary children if the Maxwell Section 6 school is transferred to Montgomery County. However, many parents with more than one school-aged child would have difficulty meeting the costs.

Base Morale. Given the above perceptions and conditions, all base parties believe that the loss of the base school will have a significant impact on base morale, negatively affecting recruitment and retention. Base parents believe that the loss of the school, combined with shorter Air University course assignments, will lead to a large proportion of personnel transferring to the base without their families--a condition that is further detrimental to morale and which runs counter, they note, to the military's focus on strengthening and supporting the family unit.

As the Air University attempts to be highly selective in its admissions, morale problems could have serious repercussions for Air Force professional training and development. For example, one officer admitted that he is leaving the base--including giving up tenure at the University--in order to move to a community where his secondary-level child can obtain a more suitable education. Two other parents stated that they are leaving the base only because of their desire to obtain a better education for their children. These anecdotes of avoiding Maxwell AFB assignments demonstrate a phenomenon that base personnel believe will become more widespread should a transfer occur.

DECISION SUMMARY

There are a number of facilitating and impeding factors that must be considered when deciding whether to transfer the Maxwell AFB school.

Factors which facilitate a transfer are:

- Montgomery County is willing to assume responsibility for the base students.
- Montgomery County already educates the majority of the military dependents in the area.
- Montgomery County is a large school district which could easily absorb the base student population.
- The base schools could easily be moved off-base by redefining the base boundary, and ownership of the facilities could then be transferred to the county.
- The county is willing to take the existing facilities even without the necessary expansions.
- Under the existing court order, the county officials believe that base students, including students from Maxwell Heights, can remain at the current facilities.

Factors which impede a transfer are:

- Current negotiations concerning the LEA's desegregation plan could influence school assignments, forcing the Maxwell school to lose its status as a neighborhood school.
- The Montgomery County schools do not appear to have strong local support; they have had trouble increasing their local revenues, which are perceived to be inadequate for current needs.
- The base facilities have extensive unfunded construction needs, which the LEA probably could not fund.
- Base parents believe that the quality of their children's education will deteriorate if transferred to an LEA which is less able to serve the needs of military dependents, to provide

adequate educational resources, or to meet base parents' educational expectations.

- The morale effects of a transfer are likely to be significant, and to adversely affect the Air University's recruitment and retention of highly educated students and faculty members.

OPTIONS TO CONSIDER

Given these factors, two options should be examined: No transfer, and transfer to Montgomery County under the assisted option. The coterminous option does not appear feasible; neither the base nor LEA personnel consider this option desirable, and the state is not likely to support special legislation to permit it.

No Transfer. Continuation of the status quo remains an option for two major reasons. First, under the Section 6 system, base children are receiving a high-quality education, as well as individualized attention to the needs of the transient student. If a transfer were to occur, it is very likely that many base parents would enroll their children in private schools rather than in the local district. However, for parents with more than one school-aged child, and for all enlisted parents, this would create a financial hardship. As a result, the base is likely to experience significant morale problems. Moreover, the Air University may have difficulty in faculty recruitment. Keeping the Section 6 school on base will ensure that the base remains an attractive assignment post for Air Force personnel with elementary-age children.

Transfer to Montgomery with an Assisted Option. The logistics of a transfer to Montgomery County are fairly straightforward. Not only is the local district willing to assume responsibility for the students, but the physical transfer could be fairly simple--the facilities can easily be moved off-base, ownership of the facilities could be transferred, and the base students would yield a manageable increase in county enrollment. However, because current Impact Aid reimbursement may not cover the local share of per-pupil costs, and because the willingness of taxpayers to increase local revenues is uncertain, the assisted option should be considered if a shortfall occurs.

If a transfer to Montgomery County were to occur, a number of other issues need to be addressed through negotiations, including the provision of funds for needed expansions of the base facilities; an understanding that some mechanism would be established to give base parents input into the education of their children; an agreement to keep all on-base and Maxwell Heights students at the present base school; and employment conditions for teachers and other school staff.

IV. FORT MCCLELLAN, ALABAMA

BACKGROUND: FORT MCCLELLAN

Fort McClellan, established in 1917, is the home of the Army's Military Police School,[1] Chemical School, and the DoD Polygraph Institute. A basic combat training brigade is also housed at the fort. Tours of duty for those in the Military Police School range from 3 to 18 months; the Chemical School and other base divisions have longer tours of duty.

Geography and Economy. Fort McClellan is located in Calhoun County, in northeastern Alabama. The base's 46,000 acres occupy almost 12 percent of county land. It is surrounded by the towns of Anniston to the south and west, and Jacksonville to the north. The base supports a military population of 8,900, with approximately 2,300 dependents. An additional 4,147 civilians are employed by the base. This represents about ten percent of the county's employed labor force.

Fort McClellan contributes significantly to the local economy. The base has a monthly payroll of $19 million, 26 percent of which covers civilian pay; the annual civilian payroll is $60 million. In addition, 73 percent of the base dependent population reside off-base. The city of Anniston and Calhoun County have been the major beneficiaries of the military presence.

History of the Fort McClellan Section 6 School. The base elementary school was established in 1963, in response to segregation in the local community. Prior to 1963, all base students attended school in Anniston. As a result of base expansion, enrollment has more than doubled from 235 in 1963 to 525 in 1987. The base school facility has been expanded to relieve overcrowding, including the addition of eight relocatable units and a computer lab.

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[1] As recommended by the Defense Secretary's Commission on Base Realignment and Closure, the Military Police Basic Training courses will be transferred from Fort McClellan to Fort Leonard Wood, Missouri, at a yet unspecified date in the future. The Department of the Army estimates that the realignment will result in the loss of approximately 1,680 student personnel, as well as a reduction of permanent party personnel currently assigned to Fort McClellan.

Currently, on-base students in grades 7 through 12 are given the option of attending one of three local school districts: Calhoun County, Anniston, or Jacksonville.

BACKGROUND: CALHOUN COUNTY, ANNISTON, AND JACKSONVILLE

Geography and Economy. Calhoun County encompasses 611 square miles in northeast Alabama. In 1980, the county had a population of 120,000. Anniston, with a population of 30,000, is the largest city in the county. Jacksonville is a smaller town of 9,700 located about five miles north of the base. Anniston and the areas of Calhoun County around the base derive their income primarily as a service economy for the base community. Jacksonville is the home of Jacksonville State University; it is primarily a "college town." The remainder of the county has an economy based on two major income sources: the Anniston Army Depot, which employs about 4,500 civilians, and agriculture.

Local School Systems. Given the current arrangement for base secondary students, three school districts are candidates for a transfer of the base elementary students.

Calhoun County Schools. The county operates 16 schools, with an enrollment of 11,133. The county schools closest to the base are Weaver High School (grades 7 through 12) and Saks Middle and High Schools (grades 5 through 7 and 8 through 12), which are located about three miles from the base.

Anniston City Schools. Anniston enrolls 4,420 students in grades K-12. The middle school is a new facility which opened in 1986. Anniston Middle and High Schools are located fairly close to the base. The middle school is one mile, and the high school 3 to 4 miles from the base.

Jacksonville City Schools. The Jacksonville school district is a small, unitary system enrolling 1,681 students in one elementary school and one secondary school.

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The Jacksonville school system began as a laboratory school for Jacksonville State University; it is still closely tied to the University's education program. The schools are located about six miles north of the base.

FACTORS INFLUENCING TRANSFER

Table 6 presents comparative statistics for a number of characteristics influencing the feasibility and ease of a transfer. The following section details these and other criteria which must be considered in any transfer decision.

School Population. The three local districts differ greatly in their size relative to that of the Fort McClellan Section 6 school. The Calhoun County system is over twenty times as large as the base school, whereas Anniston is only about eight times as large and Jacksonville about three times as large. Thus, a transfer of the base elementary students would result in varying levels of impact on the three local systems: Calhoun County's enrollments would increase by only 4.7 percent, Anniston's by 11.9 percent, and Jacksonville's by 31.2 percent--almost one-third of its total enrollment.

Future plans to transfer the Military Police Basic Training courses from Fort McClellan to Fort Leonard Wood could have an impact on the Section 6 school enrollment. The transfer will reduce the base military population by approximately 1,680. Although most would be Military Police School students with no dependents in the Fort McClellan Section 6 school, instructors and other permanent party personnel, who are more likely to have children living on the base, would also be transferred. This could reduce the Section 6 school enrollment, making it relatively easier for each of the three LEAs to absorb the Fort McClellan elementary school population. However, since many military assigned to Fort McClellan currently live off base, it is more likely that Section 6 enrollment will remain constant, as the military and their dependents move onto the post to fill any vacated base housing.

Table 6

FORT MCCLELLAN, CALHOUN COUNTY, ANNISTON, AND JACKSONVILLE SCHOOL DISTRICTS

Item	Fort McClellan	Calhoun County	Anniston	Jacksonville
Enrollment (1987-88)	525	11,133	4,420	1,681
Ratio (McClellan to LEA)		(1:21)	(1:8.4)	(1:3.2)
Grade span	K-6	K-12	K-12	K-12
Number of schools	1	15	11	2
Elementary	1	6	9	1
Middle/junior high	0	1	1	0
High school	0	3	1	1
Other	0	5[a]	0	0
PPE[b] (FY 1988)	$3,375	$2,607	$3,304	$2,595
Pupil/teacher ratio	16.4	18.6	16.7	16.2

[a] One K-9, four K-12.

[b] Total revenues per ADA for the three local systems.

The base is tied more closely to the county than to the independent cities. The majority of off-base military dependents (63 percent) reside, and therefore attend school, in Calhoun County. About 16 percent each attend Anniston and Jacksonville schools. This enrollment pattern is apparently driven primarily by housing opportunities.

Interactions Among School Systems. Currently, base students in grades 7 through 12 attend, at their discretion, an upper-level school in Calhoun County, Anniston, or Jacksonville. Each local system provides transportation for those students who wish to attend one of its schools. The base school allows each of the three districts to provide a student-parent orientation for graduating 6th graders. This is a long-standing arrangement which each school system finds satisfactory.

According to Impact Aid statements, 63 percent of the on-base secondary students (130 students) attend Jacksonville High School, whereas only 24 percent (48 students) enroll in Calhoun County and 13 percent (28 students) in Anniston. About 50 percent of last year's graduating Section 6 sixth graders chose to attend Anniston Middle

School; however, before the new middle school opened, the annual enrollment of on-base students at Anniston was much lower. Base school officials believe these enrollment trends suggest that perceptions of quality are the driving force in school choice, as parents perceive that Jacksonville, with its small size and university connection, offers the better education.

Although each of the three local school districts prefers to maintain the present arrangement, with the Section 6 elementary school operating on-base, all three districts are willing to assume responsibility for the students should a transfer occur. Preference for the status quo stems largely from officials' opposition to any disruption in the current free-choice arrangement that exists for on-base secondary students. Local officials believe that a transfer of the base elementary students will affect the secondary enrollment pattern, as base elementary students entering 7th grade might be more likely to attend secondary school in the district that is responsible for the base elementary school. All local officials believe that the current arrangement is preferable, as it is perceived to work to no one's disadvantage.

Facilities. Fort McClellan houses all its K-6 students in one facility, the Fort McClellan Elementary School. The school building complies with both Alabama state code and base guidelines.

The facility is currently overcrowded; eight relocatable units, paid for through Operations and Maintenance (O&M) funds, provide needed classroom space. The school has requested the construction of additional classrooms to replace the temporary units and for needed repair work; however, this funding has not been appropriated. Necessary repair work, based on a 1987 O&M review, includes kitchen expansion and improvement, storage addition, administrative addition, parking expansion, reroofing, expansion of play area, and renovations to classroom lighting and flooring. The five-year plan for the expansions and renovations totals $3.3 million.

Jacksonville is willing to take the on-base facility as is, without additional construction; Anniston would make the necessary construction costs part of a transfer negotiation. Calhoun County would accept the facility only if the current deficiencies were corrected. In any event, the necessary repairs/renovations probably would be funded by the federal government because neither the local districts nor Alabama is likely to have much funding for major capital outlay expenditures in the next few years.

Ownership and Operation of Base Schools. Although Fort McClellan is a closed base, access is granted for school buses from the three local school districts to bus secondary students on- and off-base. Base leaders do not believe that additional buses to transport elementary students would create any problems.

The base commander is willing to arrange for a long-term lease and to provide support services (fire, police, etc.), but will not provide ground or building maintenance or utilities. This arrangement is acceptable to the three school districts.

LEA Financial Resources. Local sources of revenue differ for county versus city school systems. A county school district's revenues come from district regular and special taxes, as well as the system's prorated share of the countywide ad valorem and sales taxes designated for education. Such countywide taxes are distributed among all of the school systems in the county on a per-pupil basis. In Calhoun County, these funds are distributed among the county and independent city school systems of Anniston, Jacksonville, and Oxford. In addition to the above sources of revenue, city school districts also receive the proceeds of any city ad valorem and sales taxes designated for education.

Local financial support varies among the three LEAs. Calhoun County provides a lower-than-average share of local revenues--16.5 percent compared to the state average of 21.7 percent. County taxes have not been raised in many years, and it is anticipated that no effort will be made to increase tax rates when they come up for voter reapproval in 1990; the current voter climate in the county does not seem favorable to increased educational spending. Jacksonville also has a relatively low level of local support of only 17.0 percent. This figure is slightly misleading, however, as the Jacksonville district capitalizes on many free services and resources available at Jacksonville State University. For example, Jacksonville has use of the University football stadium and in-service training facilities, as well as teaching provided by university teacher-educators. Finally, Anniston has generated a great deal of local support for its educational system; its local contribution has recently been increased to 24.5 percent of all school revenues. Further, the city has recently raised bond issues for the construction of the new middle school and for an additional elementary school.

The local districts vary in their capacity to fund additional base students. Currently, Jacksonville is a Regular A district; with the addition of the base students, it would become a Super A district. Under 1987 guidelines, it would receive $1,678 per base pupil--almost four times the city's current local per-pupil expenditure of $440. Calhoun County would remain a Regular A district, receiving $629 per pupil in FY 1987, as compared to its local PPE of $492. Anniston's local contribution of $811 would not be fully covered by Impact Aid, as the city would remain a Regular A district, receiving less than its current local per-pupil expenditure. However, Regular A funding has been declining, so there is no guarantee that even Calhoun County would be adequately compensated for its local contribution. Local officials generally are concerned about this trend in Impact Aid funding.

Finally, because a transfer of the Section 6 schools would increase student enrollment of the designated LEA, some redistribution of local educational funds would result. Thus, the receiving LEA would be eligible for a higher proportion of countywide educational revenues, which are distributed according to ADA.

School Board Voting and Representation. The three local districts are all receptive to instituting channels for base parents' input to the school board; they differ, however, in the input channels they prefer, and in the formation and composition of their school boards.

Anniston has a five-member school board appointed by the City Council. In the case of a transfer, the Anniston superintendent does not favor having an ex-officio member added to this board. He does, however, support other opportunities for base parents to have input, either through established procedures for being placed on the school board agenda, or through the formation of a separate PTO or advisory committee.

Calhoun County has a five-member elected school board. However, as the result of a recent court order, the board will be expanded to seven members, elected at large. The county would allow an ex-officio member on their school board, and would encourage base parent participation on an advisory committee which is currently being formed to assist the board.

Finally, Jacksonville also has a five-member elected board. In the past, military parents have served as ex-officio members of the board, and the district is amenable to such a position for a base representative in the event of a transfer. The school superintendent noted that participation of military parents is encouraged. Currently, a military parent living in Jacksonville serves on the school board's advisory committee.

The possibility of a military parent or spouse serving on a local school board, should a transfer occur, is remote. The transience of the military family makes it unlikely that they could achieve the local political support necessary for a board election or appointment. Base parents who are Alabama residents could vote for board elections in Calhoun County, which has no waiting period for its residency requirement. However, base parents who are Alabama residents would not be able to vote in the separate city district of Jacksonville, nor would they be able to vote for those who appoint school board members in Anniston.

School Assignment. All school districts in Alabama are under a statewide court order for desegregation. This issue is moot in Jacksonville, which has only one elementary and one secondary school. In both Calhoun County and Anniston, some semblance of neighborhood elementary schools has been retained, and no racial quotas exist. Anniston has the only active court suit, but school officials do not believe the court order would prevent retention of the base school as a neighborhood school.[2] It should be noted that if the base students are transferred to Jacksonville, the district would lose its unitary system status, and school assignment could become an issue under the statewide desegregation order. The two districts do differ in racial balance;[3] however, the current acceptance of neighborhood schools strongly suggests that busing of on-base students could be avoided.

There are other reasons for changing school assignments in the event of a transfer. Calhoun County officials stated that they may want to reassign all base students to off-base schools, as they expect to be under capacity as soon as their new elementary school is completed, and as they are concerned about the legality of spending local funds to expand or renovate a building on federal property. Also, if Anniston were to receive these students, the base 6th grade students would probably be reassigned to the middle school, which includes grade 6.

The base currently uses seven buses to transport students to the Fort McClellan school, with two buses making two trips each day. Thus, any local district absorbing the base school will need to fund an additional seven buses at minimum; more buses will be needed if students are to be reassigned.

Employee Status. The Fort McClellan school has 59 employees, including 32 teachers, 12 teacher aides, and four administrators. In the event of a transfer, a number of issues regarding the employment status of these individuals must be addressed.

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[2] The U.S. Justice Department recently reviewed the status of desegregation lawsuits against 200 school districts. As of March 21, 1988, the status of school desegregation cases filed against the three school districts was as follows: Calhoun County--inactive, monitoring; Anniston--active, under investigation; Jacksonville--unitary, inactive. See *Education Week*, June 1, 1988, p. 18.

[3] The minority enrollment in each school system is: Calhoun County: 9 percent; Anniston: 71 percent; Jacksonville: 18 percent; and Fort McClellan: 43 percent.

Job Security. All three districts stated their willingness to hire as many base teachers as possible. Special area teachers and other support staff (especially teacher aides) would be at risk of losing their jobs, however, as the base employs more of these workers, per student, than do any of the local districts. Calhoun County explicitly stated that it would not hire any more personnel than allowed under its Minimum Program funding levels; it is doubtful whether either Anniston or Jacksonville could hire many more than their Minimum Program allowances.

Tenure. Alabama law gives LEAs the option of granting tenure to teachers transferring from another school system, with five years of teaching experience. Otherwise, all newly hired teachers must work three years before tenure is granted. Local school districts determine how many years of experience will be credited. Calhoun County would not recognize years of experience for granting tenure status to the base teachers; Anniston and Jacksonville would.

Salary. All three districts would recognize base teachers' years of experience for the purpose of qualifying for the local district's tenured salary schedule. As Table 7 demonstrates, with few exceptions, base teachers would suffer a loss in pay under a transfer, even with the granting of tenure status. Salaries in Calhoun County are about $500 to $2,500 lower than they are on-base. Anniston's salaries are less variable; they are about $1,000 to $2,000 lower. Jacksonville, in contrast, has a high starting salary, so that beginning teachers in this district earn the same or more than base teachers. As years of experience increase, however, the base salaries overtake Jacsonville's, so that with ten years of experience, base teachers earn about $500 to $1,500 more than those working in Jacksonville. Furthermore, the relatively higher Fort McClellan salaries continue to increase to 15 years of experience, whereas no local district schedule credits more than ten years.

Benefits. Individual buy-ins to the state retirement system would be prohibitively expensive, and permit only a maximum of five years to be purchased. A group buy-in would require special legislation. Other

Table 7

DIFFERENCES BETWEEN THE FORT MCCLELLAN AND AREA LEA SALARY SCHEDULES (1987-1988)

Years of Experience	Ft. McClellan Teacher Salaries ($)	LEA Comparisons ($)[a]		
		Calhoun County	Anniston	Jacksonville
Bachelors degree				
0 years	19,021	-894	-1,235	-8
5 years	21,984	-1,762	-1,760	-677
10 years	23,138	-2,583	-2,168	-1,638
Masters degree				
0 years	21,352	-473	-1,063	+576
5 years	24,538	-1,298	-1,535	-38
10 years	25,689	-2,124	-1,962	-996
Masters + 30 hours				
0 years	23,036	-702	-1,026	+1,016
5 years	26,385	-1,551	-1,523	+442
10 years	27,535	-2,378	-1,908	-515

[a] Alabama LEAs maintain two salary schedules, for tenured and nontenured teachers. In this table, salaries for beginning teachers, with 0 years of experience, are based on the nontenured schedules. All of the other examples are from the tenured salary schedules. Because base teachers work under personal service contracts, there is no tenure at Fort McClellan and everyone is paid according to a single salary schedule. Salary schedules for the different school systems credit a varying number of years of experience. The Fort McClellan schedule credits up to 15 years of experience; Calhoun County credits nine, Anniston ten, and Jacksonville seven.

benefits should not pose a problem; all three districts offer health and life insurance plans.

OTHER CONCERNS OF PARTIES INVOLVED

The potential transfer of the Fort McClellan Elementary School to a local district involves several additional issues that affect the ease with which such a transfer could be implemented.

Question of Jurisdiction. A complicating factor to a transfer is the fact that three local systems are currently educating the base secondary students, and thus have some jurisdictional claim over the base elementary students. Because the state prefers to have this issue resolved at the local level, selection of an LEA would be the product of a local agreement. Although all three local districts prefer to retain the base school as a Section 6 school, they also all are amenable to adding the base school to their systems. Anniston and Jacksonville, in particular, feel that the base school should be under their control. Calhoun County is less enthusiastic, and as such, is not unwilling to let the base school go to one of the two city districts. Because Calhoun, as the county jurisdiction, must sign off on any transfer agreement, it is easier to transfer the base school to one of the cities.

The question of jurisdiction can be addressed from several perspectives:

1. *Geography:* Anniston is adjacent to the base, whereas Jacksonville is located six miles north of the base. The base is located completely within Calhoun County. Thus, in a geographic sense, Calhoun County, and then Anniston, have the strongest claims. Moreover, Jacksonville or Calhoun County buses going onto the base would have to cross the Anniston school district.
2. *Governance:* Base parents' participation in the governing process would vary by school district. For example, Jacksonville is not contiguous with the base, so it is doubtful that base residents could vote for school board members in a city located in a separate section of the county. This issue does not arise in Anniston because the school board is appointed by the city council, although base residents could not participate in council elections either. Base parents could participate in county elections; however, Calhoun's switch to at-large elections will dilute the impact of base votes.

3. *Legal Challenges:* The transfer of base students to one of the cities may result in legal challenges on the part of the other city. Jacksonville and Anniston officials both perceive advantages to the transfer. Moreover, they realize (as noted above) that the transfer of the elementary school children to one school system could influence which district the grade 7-12 base students attend.

Quality of Education. All base parties expressed concern over the drop in educational services that they believe students would suffer in the event of a transfer. Of particular concern were the following differences they perceive between the base school and the local school districts: Greater resources on-base, including more teaching materials and supplies, more support staff (aides, school nurse, art, music and physical education teachers), and extensive special education services; a stronger on-base volunteer network; better base school procedures for dealing with high rates of student turnover; base parents' disapproval of the use of corporal punishment in the LEAs;[4] less flexibility in local systems due to strict state and federal requirements for attendance, Title I eligibility, etc., which would adversely affect the military child; and the perception that base teachers and students better understand and support the military child's unique needs. In general, base parents felt that school funding levels in Alabama and in the local districts prevent the provision of adequate educational services.

In addition, base parents complain that there are few alternatives to the public schools if a transfer occurs. First, of the six private schools in the area, four have religious affiliation. Second, base parents do not believe the private schools are of much better quality than the public schools. Third, most base personnel cannot afford to send their children to these schools. Thus, base parents do not believe their children can receive a suitable education anywhere but at the base dependents school.

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[4] Of the three local systems, Jacksonville and Anniston both stated that they are actively moving away from corporal punishment and using assertive discipline instead; Calhoun County officials noted that some of their schools use assertive discipline rather than corporal punishment.

Base Morale. The base commander believes that base morale would be affected if the base school were transferred to local control. While the commander expects that base-community relations could be maintained or restored, he is concerned about the effects of a transfer on the desirability of an assignment at Fort McClellan. As most families do not have a choice in this assignment,[5] recruitment would not be affected as much as the morale of the personnel who must accept an assignment that they may view as undesirable. The base commander is concerned that such feelings could adversely affect the base's ability to fulfill its mission.

DECISION SUMMARY

In deciding whether to transfer the Fort McClellan school or keep it as a Section 6 school, a number of facilitating or impeding factors must be considered.

The factors which facilitate a transfer are:

- The majority of the military dependents live off-base and are educated by the three local systems, with most enrolled in Calhoun County.
- The three local systems are willing to accept the transfer of the base elementary students.
- State officials feel the county will have to sign off on the transfer. Calhoun County school officials would allow a transfer to either of two cities.
- The three local districts already have access to the base to bus secondary school students. Access has never been a problem.

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[5] Families with special needs, such as a handicapped student, do have some choice in their assignment, and could avoid an assignment at Fort McClellan if they perceived a lack of appropriate resources for their child in the local community.

- Base leaders would allow a local district to use the base facility under a lease agreement.
- Anniston and Jacksonville would continue to use the base facility as a neighborhood school; only base students would attend.
- Anniston schools receive good local financial support.
- In the event of a transfer, Jacksonville would receive Impact Aid funding well in excess of its local contribution.

The factors which impede a transfer are:

- A jurisdictional decision must be reached as to which local district has responsibility for educating the base students. State officials maintain it must be worked out among the three districts. The decision is complicated by the concerns of officials in Anniston and Jacksonville that a transfer of elementary students to one district would eliminate the free-choice arrangement for secondary students.
- Impact Aid would not adequately cover Anniston's local PPE contribution. It would barely cover Calhoun's current local contribution. However, the recent decrease in Regular A Impact Aid indicates a shortfall for Calhoun County in the near future.
- The base facility is overcrowded and in need of extensive capital outlay. If the federal government does not provide the necessary funds, it is doubtful that the local districts could finance the necessary construction.
- Base parents do not want to lose the influence they have over their children's education.
- Base parents do not want to exchange what they perceive as an excellent school, geared to transient students, for local schools perceived as offering fewer educational services.

- The base commander believes the loss of the Section 6 school would adversely affect troop morale.

TRANSFER OPTIONS

Given these considerations, two options should be considered: no transfer, and transfer of all base students to either Anniston or Jacksonville city schools. The coterminous option is not considered because the state requires a school district to have tax-levying capability, and is not willing to support special legislation to allow this option. Also, both Calhoun County and Anniston officials oppose this option because they believe it would lead to reduced state- and county-level funds for other county students.

No Transfer. Retaining the Section 6 school remains an option for several reasons. First, the Section 6 elementary school provides base children with a high-quality education. Educational services for special students--the gifted, handicapped, and remedial students--would be less available in the local schools, as would students' opportunities for instruction in art, music, physical education, and other supplemental instructional areas. Second, base parents would be able to maintain direct input into their children's education through their own school board. Third, transfer to any local district would disrupt a secondary school enrollment pattern that is favored by all parties, thereby creating some degree of antagonism among the local districts, potentially even a legal challenge. Finally, the no transfer option avoids a lowering of troop morale which could adversely affect the operations of the Fort McClellan installation.

Transfer to Anniston or Jacksonvile. Calhoun County is not considered a viable district for receiving the Section 6 students, primarily because of its expressed desire to move the base students to a county school and because of its low level of local support for educational funding. Anniston and Jacksonville are more appropriate choices as the receiving district, although each has its advantages relative to the other. The following lists compare the differences between the two transfer site options that should be considered when deciding which district is more appropriate as the receiving system.

ANNISTON	JACKSONVILLE
As a Regular A district, Impact Aid would not adequately reimburse Anniston's local PPE contribution. An assisted option would avoid this drop in funding.	Full transfer possible with no loss of funding at the PPE level. In fact, the district would receive a windfall profit from Super A Impact Aid funding.
Base students could be relatively easily absorbed, as they would constitute a 12 percent enrollment increase.	Current base school enrollment would constitute a 31 percent increase, which may be more difficult to absorb.
Educational services are perceived to be lower than in Jacksonville, although an effort is under way to improve the system.	Quality of education is perceived to be higher than in Anniston.
Relatively high level of local financial support exists.	Relatively low level of local financial support, although some support services are provided by the University.
District is located close to base housing. This is the only district students can attend without having buses cross another district's borders to come onto the base.	District is not adjacent to base, but located about 6 miles north. Buses must cross through Anniston and Calhoun school districts to get to the base.
Base parents could conceivably serve on appointed school board.	Base residents would have no voting rights in Jacksonville, but may have an ex-officio member on the school board.
Sixth-grade students would likely be moved to the local middle school.	All K-6 students could remain at the on-base school.
Currently serves few on-base students (13 percent).	Currently serves a high proportion of on-base students (63 percent).

If a transfer were to occur, a number of additional concerns should be addressed during negotiations, including LEA agreement to keep on-base elementary students at the Fort McClellan school; an arrangement for base parents to have input into their children's education; agreement on the conditions of employment for Section 6 staff transferring to the LEA; and arrangements to ensure that the necessary construction and repairs are made at the base school, and that the site will be adequately maintained in the future.

V. FORT RUCKER, ALABAMA

BACKGROUND: FORT RUCKER

Established in 1942, Fort Rucker houses the Army Aviation Center, the Army Safety Center, the Aviation Development Test Activity, and the Army Aeromedical Center. Fort Rucker provides training to pilots of the Army, other military services, NATO, and other American allies. About 40 percent of the 8,500 military personnel assigned to the base are students. Students stay for ten months to one year; otherwise, the average tour of duty is three years.

Geography and Economy. Fort Rucker is located in southeast Alabama, about 30 miles northwest of Dothan. The post reservation encompasses some 64,000 acres straddling Dale and Coffee Counties. However, the housing and schools are located in Dale County.

The base is a major economic resource for the area. Fort Rucker's programmed FY 1987 monetary expenditures exceeded $819 million. This included a military payroll of almost $210 million, a civilian payroll of $92 million, and contracts totaling over $340 million. In addition, about 40 percent of the military and almost 60 percent of the military dependents live off the post.

History of the Section 6 School. Originally, most of the base students attended Ozark city schools. The Fort Rucker Elementary School was established in 1963 as a result of the base's rural location and segregation in the local school districts. Ten years later, the primary school was built to accommodate an expanded school population. During the Vietnam War, the Fort Rucker school enrollment peaked at 1,700. In 1988, approximately 1,150 students attend the elementary school for kindergarten and 3rd through 6th grades, and the primary school for kindergarten through 2nd grade.

Base parents have the choice of sending secondary school students to one of three city school systems.

BACKGROUND: DALE AND COFFEE COUNTIES AND CITIES

To address the issue of transferring Rucker schools to local responsibility, the jurisdictional claims and relative advantages of five school systems must be examined. These include Dale and Coffee Counties, as well as the cities of Ozark and Daleville in Dale County, and Enterprise in Coffee County. Figure 1 shows the geographic relationship between the base and the civil divisions.

Geography and Economy. Located in the Wiregrass region of southeast Alabama, Dale and Coffee Counties are generally rural in character. The area is well suited to growing corn, peanuts, and timber, as well as raising hogs. Close to half of Dale County's 561 square miles and half of Coffee County's 680 miles are farmland. The 1980 census recorded a population of 47,821 for Dale County and a population of 38,533 for Coffee County.

The economies of the three cities surrounding the base draw on both agricultural and military resources. Ozark, with a 1980 population of 13,188, is the county seat and the largest city in Dale County. Located east of the base, Ozark bills itself as the "Home of Fort Rucker," and is oriented toward providing services to the base. In addition, the city's industries include textile production and peanuts, timber, and pulp wood processing.

Daleville, with a population of 4,250, is located southeast of the base. Naming itself the "Gateway City," because it is adjacent to one of Fort Rucker's access gates, Daleville also has an economy based on providing services to the base and its personnel. The city has been experiencing population growth.

Finally, Enterprise, with a population of 18,033, is the largest city in Coffee County. Located to the west of the base, the town not only serves Rucker, but is also a trading center for the area. Enterprise supports several industries, including steel and aluminum fabrication, textile production, and poultry processing. The city's population has been growing.

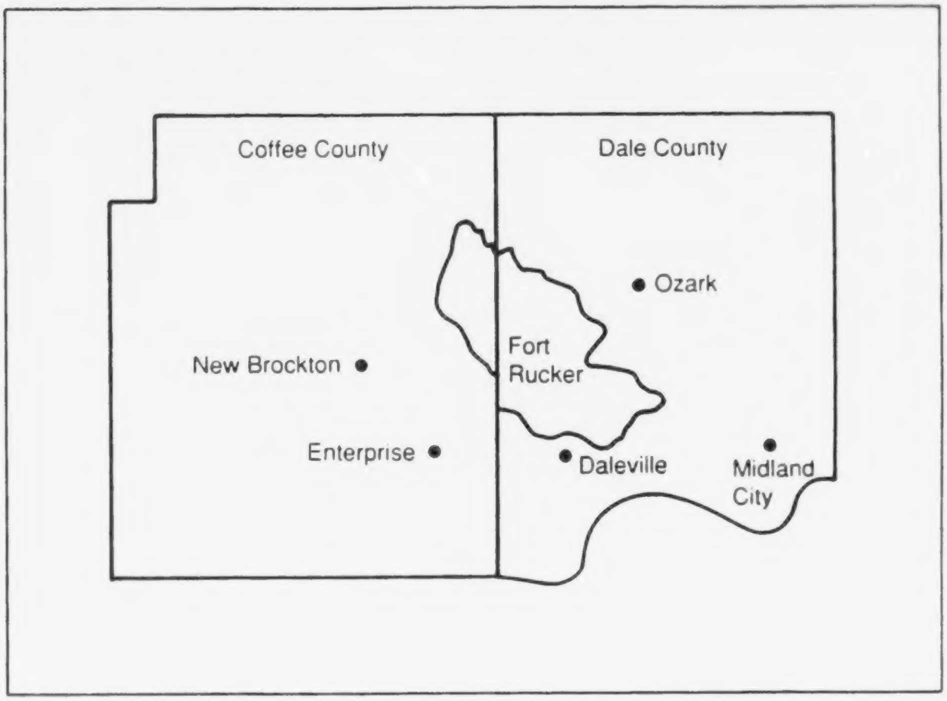
Coffee County
Dale County
Ozark
Fort
Rucker
New Brockton
Enterprise
Daleville
Midland
City

Fig. 1—Location of Fort Rucker and neighboring LEAs

School Districts. The five school districts can be characterized as follows.

Dale County has a school population of 2,600, educated in seven schools in the eastern half of the county. The independent school systems of Fort Rucker, Ozark, and Daleville serve the western half of the county. The nearest school to the base, Midland City, is some 20 miles away. Currently, the county educates no base students.

The **Ozark** city school district has a school population of 3,700 in six schools. The system is known in the area for its arts programs. The school district is adjacent to the base and, in September 1987, 204 (48 percent) of the base secondary students attended Ozark schools.

The **Daleville** city school district includes 1,500 students in three schools. This district was created in 1964 because city residents did not feel that the county school system was assigning local schools a fair share of Impact Aid revenues. At the time, 80 percent of the Daleville enrollment was military-related. Also located adjacent to the base, 87 (one-fifth) of the base secondary students attended Daleville schools in September 1987.

Coffee County has a school population of 1,900, attending six schools. The county also has two independent city school systems. LEA officials describe their school district as moving from a "minimum program system" to a more enriched program. The nearest school to Fort Rucker is 12 miles away in New Brockton. Currently, the county educates no base students.

Created in 1953, the **Enterprise** city school district is the largest in the area; 5,200 students attend ten facilities. The school system has a good reputation in the area for its athletic program and high school. Located about three miles from the base, Enterprise had 135 (31 percent) of the base secondary students enrolled in September 1987.

FACTORS INFLUENCING TRANSFER

Table 8 presents data comparing characteristics of the base and five area school districts. The following factors contribute to the analysis of transfer options.

School Population. The base population is large compared with the area school districts, making it difficult for the LEAs to absorb the Fort Rucker schools. As Table 8 illustrates, the ratio of the Fort Rucker school population to that of the LEAs ranges from almost the same size as Daleville to more than one-fifth the size of Enterprise. If the

Table 8

FORT RUCKER AND AREA LEAS

Item	Fort Rucker	Ozark	Daleville	Enterprise	Dale County	Coffee County
Enrollment/ADA[a] (SY 1987-1988)	1,145	3,727	1,480	5,233	2,584	1,865
(Ratio base to LEA)		(1:3.2)	(1:1.2)	(1:4.6)	(1:2.3)	(1:1.6)
Grade span	K-6	K-12	K-12	K-12	K-12	K-12
Number of schools	2	6	3	10	7	6
Elementary	2	3	2	6	2	3
Middle/junior high	-	2	-	3	1	-
High school	-	1	1[b]	1	1	3[b]
K-12	-	-	-	-	2	-
Other	-	-	-	-	1[c]	-
PPE ($FY 1987)[d]	3,490	2,690	2,604	2,647	3,002	3,308
Pupil/teacher ratio[e]	14.3	19.3	19.6	19.7	17.0	18.5

SOURCES: Alabama State Department of Education, *LEA Financial Status Report*, January 29, 1988, and data provided by the Office of Dependents Schools, Department of Defense.

[a] Fort Rucker enrollment number; city and county LEA average daily attendance (ADA).

[b] Seventh through twelfth grades.

[c] Special school and vocational center administered by the Mental Retardation Board of Dale County.

[d] Total revenues per ADA.

[e] Certified teachers per ADA.

Fort Rucker schools were transferred in total to any LEA, and the same number of Fort Rucker secondary students continued to attend each of the three city school systems as in 1987, military dependents living on base would account for 20 percent of Enterprise, 28 percent of Ozark, 31 percent of Dale County, 38 percent of Coffee County, and 47 percent of Daleville enrollments. If all of the base elementary and secondary students attended the same school system, on-base students would make up 24 percent of Enterprise, 31 percent of Ozark, 38 percent of Dale County, 46 percent of Coffee County, and 53 percent of Daleville school populations.

Because most of the military dependents live off the base, area LEAs already have a large number of military students. As with the secondary base students, most of the off-base dependents attend one of the three city school systems, a pattern which reflects housing availability. During the 1986-1987 school year, about 2,000 military dependents living off the base attended schools in Dale and Coffee Counties. The majority of that 2,000, i.e., 55 percent, attended Enterprise schools. Most of the remaining students went to the other independent districts--22 percent to Ozark and 17 percent to Daleville. The two county school systems accounted for only 6 percent of the off-base enrollment of dependents. This pattern of school attendance indicates that the city school systems have had more experience dealing with the transient military lifestyle than the two counties.

Interaction Among the School Systems. An arrangement between the base and three city school systems allows secondary base students to attend the district of their choice.[1] This arrangement dates back over ten years. In the past, the Army transported all of the secondary base students to Ozark schools. After the Army stopped providing the transportation, this compromise arrangement emerged as a means of dealing with the competing claims as to where the base students should go to school.

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[1] The only other Section 6 base with a similar arrangement is Fort McClellan, Alabama. Otherwise, all base students attend only one LEA outside the base.

The current arrangement fosters cooperation between the base and city school districts. Fort Rucker adjusted its 6th grade curriculum to be compatible with area 7th grade courses, and the Fort Rucker administration provides parents of children graduating from the base elementary school with written information on the three city school systems. In addition, Fort Rucker 6th graders take field trip tours of the three school systems, and all three city schools hold open houses for base parents and students. Base school administrators stated that parents appear to choose among the three school systems based on distance from their base housing development and school reputations. This free choice arrangement includes an understanding that students will not district hop, i.e., they will remain enrolled in the same system as long as the family resides on the post.

Facilities. Both of the Fort Rucker school facilities are in satisfactory condition. A recent survey of federally owned school facilities, conducted by the Department of Defense for the Congress, found no significant capital outlay needs.[2] Projections of future needs include expanded class space to comply with Alabama statutes lowering teacher/pupil ratios, modernizing the gymnasium, and some general repairs. However, because there are no plans to increase base housing, school enrollment should remain fairly constant and the facilities should continue to provide adequate capacity.

The surrounding LEAs do not have sufficient space available in their facilities to house the base elementary students. All five districts can comfortably accommodate their current enrollments. Daleville and Enterprise have just built new elementary schools which are being utilized at less than capacity. However, both of the school systems anticipate continued population growth, and all of the systems will have to accommodate the state's lower teacher/pupil ratio guidelines for kindergarten through 4th grades. None of the LEAs even begin to have enough room to accommodate 1,145 additional elementary students from the base. Therefore, in the event of a transfer, all five school districts would need the use of the two base schools, or provision for substitute facilities.

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[2] See *Construction, Repair, and Rehabilitation Needs of Dependent School Facilities Located on Military Installations in the U.S.*, submitted to the U.S. Congress by the U.S. Departments of Defense and Education, September 1987.

School Ownership and Access. A number of circumstances favor the continued use of the two Fort Rucker schools should a transfer occur. First, none of the LEAs has enough room to educate the base elementary students. Second, although the two schools are located well within the base perimeter, Fort Rucker is an open post and school buses from several LEAs already come onto the base to transport secondary students. Third, base officials would allow an LEA to operate the schools on the base, but base leaders prefer an arrangement in which the LEAs lease, rather than own, the buildings. Officials from all five of the LEAs and the state would accept a leasing arrangement, even though it is not everyone's first choice. Fourth, although Enterprise and Ozark prefer having substitute facilities constructed within city limits, the construction costs would be so expensive for the LEAs that leasing the existing base schools may be the only practical solution. One estimate of the cost, based on a requirement for 80 classrooms at $60,000 per classroom, is about $4.8 million. Fifth, using the facilities on the base would limit the cost to the LEA for transportation.[3] Currently, 42 percent of the base students walk to the Fort Rucker schools. Finally, parents of the base elementary school children prefer keeping their neighborhood schools.

Unlike other Section 6 schools, LEA access to the base is not so much a security concern of base leaders as it is the subject of contention among the surrounding school districts. Ozark, for example, objected when Daleville began sending buses on the base to pick up students for its school. In 1982, Dale County, Ozark, and Daleville established a countywide transportation system which precluded Enterprise, located in another county, from sending buses on the base.

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[3] The estimated up-front cost would be an additional $551,000 to purchase the 19 buses required to transport all the base elementary children to replacement schools off the base.

Base leaders finally instigated the negotiations allowing Enterprise buses on the base after an incident occurred that endangered students waiting outside of the post gate for the Enterprise bus. A 1986 written agreement between Enterprise and Dale County gives Enterprise the right to send buses onto Fort Rucker to transport base students. Thus, if the two Fort Rucker facilities are used by one of the LEAs, guarantees of access may have to be negotiated, not only with the base but with the other Dale County LEAs.

Access is only one of several issues concerned parties raise when discussing the possible lease of the base schools. LEA officials voiced uncertainties about the federal government as a landlord. They asked what services the base would provide,[4] who would pay for the liability insurance and utilities, and who would provide needed capital improvements. The last is of particular concern, since state officials were not sure Alabama public funds could be spent on a building not owned by the LEA. On the other hand, the federal government has a bad track record for funding needed renovations for base schools used by LEAs.[5] So the LEAs are worried about how much control they would have over any needed base facility additions or repairs. LEA officials also question whether schools could remain open in times of military emergency.[6] State and LEA officials would want a satisfactory designation of the federal government and LEA responsibilities for facility operation before agreeing to a lease arrangement.

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[4] Currently, the base provides a number of services, such as fire protection, grounds maintenance, engineering support, and police protection.

[5] A recent survey indicated that about $90 million for building repairs and renovations were needed for base schools owned by the federal government, but operated by LEAs See *Construction, Repair, and Rehabilitation Needs of Dependent School Facilities Located on Military Installations in the U.S.*, submitted to the U.S. Congress by the U.S. Departments of Defense and Education, September 1987.

[6] Although base leaders have the right to take over the school buildings in the event of an emergency, such an action is highly unlikely. All of the bases in this study have such authority, but we have seen no example of it ever being exercised. As one base chief of staff put it, "If such an emergency occurred, there wouldn't be any school."

LEA Financing. All five LEAs are dependent on state funding as the largest source of revenue. In FY 1987, the state share of each LEA's revenues was 73 percent for Dale County, 71 percent for Ozark, 70 percent for Coffee County, and 66 percent for Daleville and Enterprise. The latter two school systems received just about the state average contribution of 67 percent. All the other systems received in excess of that average.

Local contributions varied also. Enterprise's local share in FY 1987 was 25 percent as compared to only 18 percent for Coffee County, 17 for Dale County, and 16 for Daleville and Ozark. Most of the LEAs were well below the state's average local contribution of 22 percent. The percentage of local contributions does vary from year to year because revenues for such items as major capital outlays are included. In the Enterprise FY 1988 budget statement, the percentage of total revenues locally generated declined to only 19 percent.

Local sources of revenue differ for county versus city school systems. A county school district's revenues come from district regular and special taxes, as well as the system's prorated share of the countywide ad valorem and sales taxes which are designated for education. Such countywide taxes are distributed among all of the school systems in the county on a per-pupil basis. In addition to the above sources of revenue, city school districts also receive the proceeds of any city ad valorem and sales taxes which are designated for education.

All five LEAs construct annual school budgets on the basis of the revenue they know they will receive from federal, state, and local sources. To increase these sources of funding would require additional tax levies on the part of local county or city government. Often, however, local government prefers to obtain voters' approval of any increases in taxes, a route that makes it more difficult to increase revenues. In addition, existing taxes must be renewed by referendum at given intervals. Most of the LEAs gave recent examples of voters' renewal of existing taxes designated for education use.[7] The net result generally has been no large increases in school revenues from year to year, a trend reflected in the fact that some of the teacher salary schedules obtained from these LEAs are in effect for a three-year period.

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[7] For example, in 1987, Ozark voters renewed for 20 years, a 7-mill tax earmarked to pay for school warrants.

Local funds and bond issues are also the main source for any capital outlay needs. The state occasionally raises a bond issue for construction needs which is then distributed among the school districts. About one-third of Enterprise's $2.8 million capital outlay program was paid for through the last state bond in 1984. The balance was financed through local sources. This dependence on local resources makes it highly unlikely that any of the LEAs would finance the construction of substitute facilities for the Fort Rucker elementary school students. Officials in all the LEAs agreed that if they could not use the existing base facilities, the needed classrooms would have to be built with federal or other sources of funding.

Federal Impact Aid, however, would exceed the local contributions of all five LEAs. Currently, the three cities, which already educate base high school students, receive Regular A funding, the lowest amount in the A category. If all the Fort Rucker elementary students were transferred to any one of the five LEAs, per-pupil Impact Aid payments to that district would increase dramatically. All but Enterprise would qualify as Super A districts. Under FY 1988 federal guidelines, a Super A school district would receive $1,823 for each base student. This compares to FY 1988 budgeted local contributions ranging from $409 per pupil in Daleville to $673 in Dale County. Super A Impact Aid payments then are about three times the size of the local contributions. If the Fort Rucker students were transferred to Enterprise, that district probably would qualify for Impact Aid in the intermediate A funding category.[8] Under FY 1988 guidelines, Enterprise would receive $1,368 per base student compared to a budgeted 1988 local contribution of $491 per pupil.

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[8] Based on 1987-88 enrollment data, Enterprise, with a projected base student population of 20 percent, would just qualify as a Super A Impact Aid district, should a transfer occur. However, in all likelihood, that enrollment percentage would decrease in the near future, as Enterprise officials project continued population growth at the same time base officials foresee little change in the number of military living on base. Therefore, by the time a transfer took place, Enterprise most likely would qualify for the intermediate A category of Impact Aid, i.e., the category of Impact Aid assigned to districts in

School Board Vote and Representation. In Alabama, county school boards are elected, but city school boards are appointed by the city council. Thus, the three city school systems surrounding Fort Rucker have five-member school boards appointed by the city council. The two counties have five-member school boards which are elected by the district voters. In the case of Coffee County, the board will expand to seven members by 1992 and, as the result of a court suit, the county is switching from at-large to district representation. Finally, the Dale County school superintendent also is elected.

Fort Rucker residents would be shut out from participation in any of these selection processes, except in Dale County. Because the base is outside of the city limits of Ozark, Daleville, and Enterprise base parents could not be appointed to the school board. Likewise, base parents living in Dale County could not vote or run for office in Coffee County. However, those living in base housing who are Alabama residents could vote and run for the Dale County board, although the number of base voters would probably be too small to significantly influence the elections.

Base parents expressed concern that their loss of governance, through an elected base school board, would also signal a loss of any input into their children's education. Some of the LEAs are willing to compensate for this loss by creating an ex-officio position representing the base on the school board. The Ozark school board already has such a position, currently filled by the base schools officer. Ozark officials would be willing to create a second ex-officio slot if the base elementary schools were transferred to Ozark. Daleville has had such an arrangement in the past and would reactivate the position in the event of a transfer. Dale and Coffee Counties would consider such an arrangement, but Enterprise would not.

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which at least 15 percent, but less than 20 percent, of the school population lives on federal installations.

School Assignment. In the event of a transfer, base parents would prefer to maintain their neighborhood schools--base elementary students would continue to attend classes at the two base facilities. All of the LEAs would try to maintain this concept, but some adjustments in school assignments might become necessary. The LEAs may have a number of reasons for changing school assignments.

All five of the LEAs surrounding Fort Rucker are under court desegregation orders,[9] but, for the most part, it does not appear that this would precipitate a requirement to bus elementary base students. In the case of Daleville and Ozark, the court suits are inactive, although the LEAs are still monitored. Moreover, the addition of the base schools to either city's school system would not precipitate reassignment, because the minority enrollments at the base, Ozark and Daleville are about the same, 32 to 33 percent. The situation is different in the remaining LEAs, which are under active court orders. Compared to the base, Enterprise, Coffee and Dale Counties have lower minority enrollments, ranging from 15 to 20 percent. However, officials of both counties do not believe there would be any need to bus base students to schools outside of Fort Rucker. Enterprise school officials, on the other hand, stated they might have to adjust base school enrollments, which have a larger minority population than the LEA's goal of 20 percent minority systemwide.

In addition, all of the LEAs would want to maintain the right to send outside students to base schools, although most thought they would probably not have to exercise that right any time in the near future.

Finally, in the two counties school officials indicated that if a transfer occurred, they also would want the base secondary students to attend county schools. This could lead to a complete reassignment of high school students from the nearby city systems to county schools in Midland City or New Brockton, which is a greater distance from the base.

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[9] All five of the LEAs come under *U.S. & Lee v. Dale County Board of Education*, filed in 1963.

Employee Status. Transfer of the Fort Rucker schools would have an effect on the base schools' staff, both in terms of working conditions and earnings. Discussions with Fort Rucker employees and LEA officials highlighted a number of employment issues that would have to be addressed at the time of a transfer.

The Fort Rucker school system has 159 employees, including 80 teachers, 6 paraprofessionals, 30 administrative and support staff, 10 cafeteria workers, and 33 substitutes. In discussions with LEA officials, the general consensus was that there are more base employees than could be absorbed by any one LEA.

Among the issues raised by the Fort Rucker employees are the following:

Job Security. Although most of the LEAs were not willing to guarantee employment to all of the Fort Rucker employees, the general consensus was that the classroom teachers would be hired, but probably not all of the support staff. Only Ozark officials said that they would hire everyone. Most other LEAs pointed out that they would probably not need all of the aides and professional resource personnel. For example, Enterprise's elementary school physical education program is run by aides, although they are going to be using certified personnel in the near future. Also, Enterprise has no counselors in elementary schools and only two part-time nurses in the entire school system.

Years of Experience and Tenure. Alabama law gives LEAs the option of granting tenure to teachers transferring from another school system, with five years of teaching experience. Otherwise, all newly hired teachers must work three years before tenure is granted. Local school districts determine how many years of experience will be credited. The LEAs would recognize years of experience and probably would grant portable tenure to those with five years of experience.

Salaries. If hired by the LEA, teachers with five years of experience would be paid on the higher tenured schedule, rather than the lower nontenured pay scale. However, even with this advantage, teachers would earn less in the LEAs than at Fort Rucker. As Table 9 illustrates, the differences between the base and LEA salaries increase

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with years of experience. Moreover, there are differences among the LEAs. The two counties have relatively flat salary schedules, crediting a maximum of five years of experience in Coffee County and seven years in Dale County. Because only 16 percent of the base teachers have seven years or less of experience, almost all of the base teachers would enter the county systems receiving the highest salary on the schedule. The cities offer slightly higher salaries than the counties and credit at least 15 years of experience. However, the gap between the base and city salary schedules also increases with years of experience. Since almost two-thirds of the Fort Rucker teachers have ten or more years of experience, most base teachers would experience significant salary cuts. Another difference between Fort Rucker and the LEAs is that the base school system offers two additional education-based pay categories, which do not exist in Alabama schools. As base teachers earn hours toward a Masters degree, they can qualify for salary increases under salary schedules designated for those with 10 or 20 semester hours in graduate education. The pattern of lower salaries paid by the LEAs relative to Fort Rucker also applies to support staff positions.

Benefits. Benefits vary among the LEAs. All offer the state benefits for health/life insurance, except Daleville, which has its own Blue Cross/Blue Shield medical coverage. In addition, Ozark, Daleville, and Coffee County offer cafeteria plans--supplemental options for life, dental, vision, cancer, tax shelter, and other coverage. All of the LEAs participate in Alabama's teacher retirement system. Fort Rucker employees fear that buy-ins to credit years of teaching as a federal employee will be too expensive. About two-thirds of the teachers have over ten years invested in the federal retirement program.

MAJOR CONCERNS OF PARTIES INVOLVED

LEA Selection. The situation at Fort Rucker is unique because, if a transfer occurs, five different LEAs would like to assume responsibility for the Section 6 schools. That such a high number of LEAs would want the base schools reflects several factors, including the Alabama tradition of free choice concerning school district attendance,

Table 9

DIFFERENCES BETWEEN THE FORT RUCKER AND AREA LEA SALARY SCHEDULES (1987-1988)

Years of Experience	Fort Rucker Teacher Salaries ($)	LEA COMPARISONS ($)[a]				
		Ozark	Dale-ville	Enter-prise	Dale County	Coffee County
Bachelors degree						
0 years	19,058	-461	-461	-409	-961	-533
5 years	21,995	-1,402	-1,400	-1,278	-1,512	-1,627
15 years	22,632[b]	-1,814[b]	-1,687	-1,565	-1,919[b]	-2,264[b]
Masters degree						
0 years	21,882	-523	-523	-517	-3,785	-595
5 years	25,126	-1,508	-1,515	-1,377	-1,618	-1,733
15 years	26,440	-2,372	-2,479	-2,341	-2,702[b]	-3,047[b]
Masters + 30 hours						
0 years	23,382	-570	-570	-562	-5,285	-642
5 years	26,788	-1,578	-1,585	-1,445	-1,688	-1,803
15 years	28,078	-2,418	-2,525	-2,385	-2,748[b]	-3,093[b]

[a] Alabama LEAs maintain two salary schedules for tenured and nontenured teachers. In this table, salaries for beginning teachers, with 0 years of experience, are based on the nontenured schedules. All of the other examples are from the tenured salary schedules. Because base teachers work under annual contracts, there is no tenure at Fort Rucker and everyone is paid according to a single salary schedule.

[b] Salary schedules for the different school systems credit a varying number of years of experience. The Fort Rucker and Ozark salary schedules only credit up to ten years of experience for teachers with bachelors degrees. Salary schedules for all teachers, regardless of education, stop at five years of experience in Coffee County and seven years of experience in Dale County. All other schedules go up to at least 15 years.

the financial rewards associated with adding the base students, and the financial penalties associated with allowing them to be transferred elsewhere.

The geographic boundaries of the counties and cities surrounding Fort Rucker do not necessarily determine where a child goes to school because Alabama law permits children to cross boundaries and attend school in another district even though they do not reside in that district.[10] Thus, the counties gain and lose students to other counties and independent school systems. For example, Coffee County educates about 150 to 200 students from other counties but also loses 80 students to those counties. The county school district suffers a net loss of students, however, because some county residents attend one of Coffee's two independent city systems. The three city school systems also educate nonresidents because individual schools serve traditional bus routes which extend beyond the city limits. For example, about one-third of the Daleville and Ozark students are county, not city, residents.

The net result of these student interchanges is that geographic proximity can play as important a role as jurisdictional boundaries in determining where a child goes to school. Thus, even though it is located in Coffee County, Enterprise educates about 350 Dale County residents because the Dale County schools are too distant. More importantly, the pattern of school attendance in Dale County suggests that the county school system really only serves the northern and eastern sections of the county, while the cities of Ozark and Daleville generally provide the educational services for the western part of the county. This helps explain why the base students have always attended city school systems.

The high incidence of students crossing school district boundaries also helps explain a second complicating factor, the interconnected financing of the various school districts within a county. Not only state but also county funding follows the child. Education revenues from countywide ad valorem and sales taxes are prorated among all of the school districts in the county on the basis of ADA. Daleville, for example, receives 4 mills of the countywide ad valorem tax as well as 17 percent of the county sales tax. These county prorations compensate city schools for educating county residents.

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[10] However, Alabama law also prohibits the crossing of district lines to avoid integration.

The addition of the Fort Rucker students to a school district would result in a major redistribution of the countywide funds. Because the proration is based on ADA, the district assuming control of the Section 6 schools would qualify for a larger share of the countywide funds. Conversely, all of the other districts in the county would receive lower shares. Since the actual amount of revenue generated by county taxes would remain the same, those districts without the Fort Rucker students would experience a funding loss. For example, in 1987, the Ozark city system had 48 percent of the total ADA in the county. Adding the Fort Rucker students to Ozark would increase that percentage to 55, transferring the base schools to another LEA in Dale County would decrease that percentage to 42.

LEA officials suggested a transfer of the base schools could have other repercussions on area school systems. For example, a transfer would probably affect the existing arrangement for base secondary school students. If all the base elementary school students were to attend one LEA, it becomes more likely that the base secondary school students would choose the same LEA. Moreover, officials of both county systems argued that, if the Rucker schools were transferred to their control, it would make sense to transfer all of the base secondary students to their county school system also. Another possible repercussion would be a total recalculation of county, and maybe even state, distribution of funds to area LEAs.

Because a Fort Rucker transfer would alter relationships among the area LEAs, officials of these school districts generally favored retaining the status quo--not transferring the Section 6 schools. If, however, the schools were transferred, there would be a great deal of competition among the LEAs. Because the stakes are high, in terms of both the rewards and penalties associated with a transfer, some LEA officials indicated they probably would pursue legal challenges if their school district were not the recipient of the transfer. Because state officials view this as a matter solely for local negotiation, the state would take no active role in designating which LEA should assume control of the Fort Rucker schools. However, Dale County would have to sign off on any arrangement, and, because Dale County is also one of the contenders in the transfer, this would make agreement by local negotiation unlikely.

From the base population's point of view, if a transfer had to take place, the preferred recipient would be either Ozark or Enterprise. These are the two largest school systems in the area and could better absorb the large base enrollment. These two systems already educate most of the off-base military dependents and base secondary school students. Both have a geographic proximity to the base which would make it easier for parents to participate in their children's education. Enterprise, however, might have greater difficulty maintaining the base neighborhood schools due to its Coffee County location and court-ordered desegregation which necessitates zoning of school assignments. Moreover, of the five LEAs, Enterprise appears to be the least eager to accept a transfer. Ozark, on the other hand, does not have these difficulties. Located in Dale County, the Ozark city limits extend to one of the post gates and the school district is not under active court order. Ozark also has a history of accommodating the base, as in the example of the current designation of the base schools officer as an ex-officio member of the school board.

Quality of Education. Base leaders, parents, and faculty believe that the quality of education offered base students would suffer if the Fort Rucker schools were transferred to any of the local school systems. They identify a number of contrasts between the base and LEA programs to underscore this belief.

First, base parents cite national statistics that place Alabama toward the bottom of national rankings, including 47th in per-pupil expenditure and 37th in high school graduation rate. In terms of total revenue per ADA, the three city systems surrounding the base all rank in the bottom third of the state. Moreover, base residents do not foresee any significant increases in education spending at the state or local level in the near future.

Second, base parents and faculty perceive that the base schools offer a more enriched program than that offered by the surrounding LEAs. The Fort Rucker school system is more resource-rich and able to offer more programs and services, including a self-contained gifted program, a language program, and computer labs as well as computers in each classroom. In addition, each base school has resource personnel such as a guidance counselor, nurse, and dentist-in-residence. Fort Rucker schools sponsor a number of after school activities in art, music, and band.

Third, parents and faculty argue that the base schools are better geared to the needs of a transient population. Fort Rucker schools feature more and earlier screening of new students. Because students have transferred from a number of different school systems throughout the country and abroad, the Fort Rucker faculty tries to create flexible groupings of students so that students can enter reading and other classes at their current level. Moreover, the strong ties the school has with other base services eases the transition and promotes the identification of the schools with the base community. For example, the schools tap into base programs, such as tie-ins with the base hospital, family service programs including child abuse prevention, and bus service to day-care facilities. The schools also promote student participation in base events, for example, holding poster contests highlighting base activities.

Fort Rucker faculty and parents point out philosophical differences between the base and area LEAs. The Fort Rucker primary school uses open classrooms, an approach no longer used by any of the surrounding school systems. Parents also object to the employment of corporal punishment in the surrounding schools. Fort Rucker's policy allows corporal punishment but it has not been exercised for some time because the Fort Rucker schools use the assertive discipline program.

The Fort Rucker faculty argue that the base schools place a greater emphasis on the faculty's professional development than do area school systems. Fort Rucker sponsors teachers' attendance at professional workshops. The school administration actively canvases other Alabama school systems to discover and emulate the best programs offered in the state. And teachers also feel that the resources provided aid their professionalism.

Finally, base leaders prefer to keep the base schools. They feel they are a "drawing card" for those assigned to Fort Rucker and for living on the base. Base leaders expect that parents would oppose a transfer and members of the school board suggested that, if a transfer occurred, military assigned to Fort Rucker would resist living on base in favor of living off base and choosing where their children would attend school.

DECISION SUMMARY

The following summarize the factors which facilitate or impede the transfer of the Fort Rucker Section 6 Schools to LEA control.

Factors which facilitate transfer:

- Area school systems already educate the majority of the military dependents affiliated with Fort Rucker, including secondary students living on base who attend the surrounding city school districts.
- Fort Rucker is an open post and the base already grants access to LEA buses to transport secondary students.
- All parties to a transfer would accept a leasing arrangement to allow the LEA to use existing base school facilities.
- The base schools are in good condition; there are no major renovation or repair requirements.
- LEAs would continue to operate the base facilities as neighborhood schools. With one exception, busing for desegregation would probably not be necessary.

- Impact Aid would more than adequately compensate each candidate LEA for its local share of the per-pupil expenditure.
- Most LEAs would create an ex-officio position for base representation on the boards of education.

The following factors impede transfer of the Fort Rucker schools to LEA control:

- The Fort Rucker school population is very large compared to each of the LEAs and, therefore, difficult for the small area school system to absorb.
- Although there are five contenders for taking over the Fort Rucker schools, there are no clear-cut guidelines as to which LEA should assume responsibility. Alabama state policies allow for some freedom of choice and local arrangements often result in the crossing of district lines. The state will not choose which district should take responsibility for the base students. Rather, the state contends that the decision must be the product of local agreement.
- The transfer of the base students to any one LEA would adversely affect the financing of other LEAs in the county.
- The transfer of the base students to any one LEA probably would precipitate legal challenges from other LEAs. In addition, some LEAs might dispute the right of access to the base.
- Transfer of the base elementary school students to one LEA would have an impact on the freedom of choice arrangement in effect for base secondary students.
- None of the five LEAs has sufficient space available to accommodate the base school population.
- Base parents fear that the quality of education would decline if the Section 6 schools were transferred. Students would not have access to the educational enhancements and resources currently available at Fort Rucker.

- Base leaders fear that the loss of the schools could adversely affect morale and the attractiveness of serving at the base.

OPTIONS TO CONSIDER

Given the current situation, transfer of the Fort Rucker Section 6 schools to a local LEA cannot be considered at this time. This is due more to the conditions in the surrounding LEAs than conditions on the base. There is no evidence at present that a transfer could occur without adversely affecting the financing of area education, without disturbing existing arrangements for base secondary students, and without precipitating legal challenges and poor relations among the LEAs involved. Without leadership from the state on this issue, the likelihood of the local systems coming to an amicable agreement is low.

To resolve this situation, so that a transfer may be possible in the future, requires a more determined effort on the part of state education officials to help develop an equitable arrangement for area LEAs. Enlistment of base leaders in this effort could aid the process. In the past, base leadership was instrumental in resolving the dispute between the Dale County and Enterprise LEAs over access to Fort Rucker to transport high school students living on base.

Besides looking to state and base officials to provide needed leadership, the resolution of the situation ultimately will rest on developing more creative approaches to financing a transfer which penalize neither the LEA accepting the transfer nor the other LEAs in the area. Transfer of the base schools under a contract arrangement might be one approach. Control of the schools would pass to an LEA, but the actual enrollment at the Fort Rucker schools would not count as part of the county's ADA. The distribution of countywide revenues, then, would be unaffected by the transfer. The drawback to a contract arrangement is that, under federal Impact Aid guidelines, the contracted LEA could not qualify for any Impact Aid funds. Because the three city LEAs depend on Impact Aid funds to educate Fort Rucker secondary school students, these LEAs probably would not enter a contract arrangement. However, a variation on this approach that allows the city LEAs to receive adequate federal compensation might provide a means to an equitable solution.[11]

If an equitable arrangement could be devised that allowed for the transfer of the base students to a single LEA without adverse effects on other area school systems, consideration could be given to a transfer option. At that time, selection of a candidate district should be based on the following criteria: the ability to absorb the base school population, assurance that the base facilities would continue to be used as neighborhood schools, geographic proximity of the LEA to the base, willingness to provide base parents with input into their children's education, and demonstrated willingness to address the needs of a transient population.

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[11] The Augustus F. Hawkins-Robert T. Stafford Elementary and Secondary School Improvement Amendments of 1988 (Public Law 100-297) may provide a solution. The statute allows an LEA to receive both Impact Aid and Section 6 funding. Therefore, the Department of Defense could use Section 6 funds to set up a contract arrangement with an LEA to run the base elementary schools. At the same time, the LEA could continue to receive Impact Aid funds toward the education of the base secondary school students. The stumbling block to such an arrangement is that the congressional intent was to provide the dual funding only as a one-time, short-term solution for communities in dire economic straits. At the time of preparing this Note for publication, the implementing regulations of the statute had not been published. Whether the statute also can be applied as a longer-term funding arrangement cannot be determined until the implementing regulations are analyzed.

VI. THE STATE OF GEORGIA

The state of Georgia, like other states in the south, lags behind the rest of the nation in indicators of educational achievement and financial support for education. Georgia was rated 42nd in PPE and 47th in education expenditures as a percent of income. Its high school graduation rate is 46th in the nation.

EDUCATION PROGRAM

The state education department is aware of the problems and has initiated a program to improve Georgia's educational standing.

Georgia imposes minimum standards on all of its school districts. Any school system which fails to meet these standards must develop a remedial program. Under the Georgia Quality Base Education Act (QBE), which went into effect in 1986, the state will evaluate each public school and local system every five years. Should officials of nonstandard schools fail to cooperate in improving education standards, the state board of education may file a civil court action to appoint a trustee to operate the system. All the LEAs containing Section 6 schools satisfactorily meet Georgia standards.

Part of the ongoing effort to improve public education, the QBE is an ambitious, comprehensive program creating requirements and incentives in a number of areas, including curriculum, classroom size, teacher development, and school operating and capital outlay funds. For example, to encourage consolidation of small school districts, QBE sets forth minimum-size recommendations for elementary, middle, and high schools. Schools which do not meet the recommendations cannot earn full state funding.

The state has also implemented testing programs for students and teachers. Third graders cannot be promoted until they pass the test. Beginning teachers must pass both written and performance tests to become fully certified.

SCHOOL FINANCING

State education funds are derived from income and sales taxes. On the average, the state contributes 55 percent of a district's per-pupil expenditure. School districts qualify for state funds through various formulas for O&M, transportation, and capital outlay. To obtain these funds, LEAs must contribute their local fair share of five mills property tax. LEAs can substitute sales tax and federal Impact Aid in lieu of a portion of the property tax. However, the state funding formulas penalize any LEA which does not raise five mills or its equivalent. In addition, the state encourages LEAs to raise more than this minimum contribution through enrichment formulas. The average school district levies 15 mills.

The state contributes a considerable portion of school construction costs. Although the state initially does not contribute to the site development, it does cover from 75 to 90 percent of the construction costs, depending on the wealth of the community and costs, which follow state guidelines. The state contributes $100 million annually to the Systems Comprehensive Facilities Plan, so named because each LEA prepares a five-year facility plan of prioritized capital outlay needs for that district. Each LEA is prorated and qualifies for a certain percentage of the total state entitlement. A district may accumulate the entitlement to earn a school replacement after 10 years, draw on it annually for needed renovations, or obtain an advance against future entitlement.

The state also contributes to transportation costs. Although LEAs must pay for the initial bus fleet, the state reimburses the cost over a 10-year period and contributes toward the cost of insurance, drivers' salaries, and mileage. Although most LEAs cannot fund school transportation solely from the state contribution, the state in essence funds the bus fleet's replacement as well as the majority of related transportation costs.

STATE POLICIES AND THE SECTION 6 SCHOOLS

State officials raised a number of concerns and policy issues when asked to consider taking responsibility for the Fort Benning, Fort Stewart, and Robins Air Force base schools.

Jurisdiction. Georgia state officials acknowledge the state cannot deny an education to any child domiciled in the state. Therefore, if Section 6 students become part of Georgia's schools, the state will contribute its share of the PPE cost to whichever LEA takes responsibility for education. However, state officials stress that once the LEA assumes responsibility, LEA officials must have complete control, including the right to assign off-base students to base schools.

Financial Burden. The major opposition to educating base students stems from the financial burden it will impose on the state. Fort Benning, Fort Stewart, and Robins AFB have a combined enrollment approaching 5,800 students. State officials believe it is unreasonable to ask the state to bear the major portion of the cost with no compensating federal funds or taxing authority.

State officials noted they were concerned about LEAs relying on uncertain Impact Aid to provide the local funding share of educating base children. Should the federal government cease to provide Impact Aid, the LEAs would find it extremely difficult to raise substitute revenues.

Coterminous Option. The establishment of a coterminous school district is illegal in Georgia. The state constitution states: "No independent school system shall hereafter be established,"[1] reflecting the state policy of encouraging consolidation and merger rather than proliferation of school districts.

Facilities. The ability to use existing Section 6 base buildings is influenced by state facility regulations. The state requires the LEA to hold fee simple title[2] to qualify for state capital outlay funds.

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[1] Georgia State Constitution, Article VIII, Section V, Paragraph I.

[2] Fee simple signifies a pure fee: an absolute estate of inheritance clear of any condition or restriction. It is the largest estate and most extensive interest that can be enjoyed in land.

Legislated exceptions have been made, allowing state capital funds to be expended on facilities under a long-term lease. For example, a 99-year lease would guarantee that capital outlay expenditures are applied to the LEA's benefit.

Other facility-related requirements include a guarantee of ingress and egress for the schools. The state also mandates minimum acreage for school facilities, although this can be waived for existing facilities or special circumstances.

Because each LEA's share of state construction monies is prorated, the transfer of Section 6 schools to existing LEAs would probably increase that district's entitlement share at the expense of the other state school districts.

Employees. State policies regarding tenure, retirement benefits, and collective bargaining apply to the transfer of Section 6 teachers to Georgia schools. According to Georgia law, tenure is granted by the LEA after a teacher signs his or her fourth annual contract. Even though many Section 6 teachers have taught more than four years, they may have to serve another three-year probation period upon transfer to the LEA. Georgia tenure law has been successfully defended in court. Exemptions would have to be approved by the legislature.

Georgia buy-ins to the state retirement program are possible under state legislation. For instance, the Georgia legislature recently allowed Fulton County school employees to buy into the state retirement system under the condition that the buy-in be financed by the county and not the state of Georgia. State officials take a similar position concerning any buy-in arranged for Section 6 teachers. Buy-ins would not be financed by the state.

Georgia state law prohibits collective bargaining. The Fort Stewart Teachers Union would cease to exist if that system were transferred to a Georgia LEA.

Transportation. Georgia does not finance the initial purchase of a bus fleet. Since Section 6 schools must contract out their transportation needs, the LEA or the federal government will have to provide the funds for the purchase of buses should a transfer occur.

Governance. The governance of the education system in Georgia is highly decentralized. Each community chooses its method of governance, resulting in a great variety of systems used. For instance, the Muscogee County board of education cannot levy taxes; the Houston County school board can. All counties require county residency for voting, but requirements and processes for school board election vary. It is highly unlikely that many military parents could vote in school board elections and even more unlikely that any could win a seat on the board.

VII. FORT STEWART, GEORGIA

BACKGROUND: FORT STEWART

Established in 1940, Fort Stewart is the home of the 24th Infantry Division (Mechanized) and a number of tenant units. Approximately 13,000 military are assigned to the base

Geography and Economy: Located 40 miles southwest of Savannah, Fort Stewart encompasses 279,000 acres of Liberty County. Hinesville, the county seat, is the closest town to most base housing and administration.

Fort Stewart is a major economic resource for the area. In FY 1987 base expenditures totaled $203.7 million, including $46.7 million in contracts. The post employed over 3,500 civilians on a $62.3 million payroll. In addition, 35 percent of the military assigned to Fort Stewart live off the base. In 1987, this meant that approximately 4,600 military and 8,100 dependents resided in the communities surrounding the base.

History of the Fort Stewart Section 6 Schools: The base Section 6 school was established in 1963 because the local education agencies had made no plans to integrate the public schools. At the time of its founding, approximately 350 students attended grades 1 through 6. In 1964, kindergarten was added. Current enrollment is over 1,600 elementary students housed in two facilities.

BACKGROUND: LIBERTY COUNTY

Geography and Economy: Located in the coastal region of southeast Georgia, Liberty County covers 517 square miles. However, Fort Stewart takes up nearly 50 percent of the county land.

Population growth has been tied to the base. Hinesville grew over 115 percent between the 1970 and 1980 census, due primarily to the assignment of the 24th Infantry to Fort Stewart in 1975. The 1980 census recorded a county-wide population of 37,583 and Hinesville population of 11,309. The area has continued to grow over the last decade, aided by the fact that base housing is frozen at approximately 1,600 units. Base representatives agreed with local business leaders that any new housing required by base growth would be met by the local community. In addition, a number of retired military have chosen to reside in the county.

While the base is the area's greatest economic resource, Hinesville has some light manufacturing of fiberboard and children's wear, and the county has some agriculture. However, the government remains the area's largest employer, accounting for over one-third of the labor force.

County School System: Liberty County provides kindergarten through 12th grade education for an enrollment of approximately 7,200 students.

FACTORS INFLUENCING TRANSFER

The following factors influence whether consideration should be given to transferring the Fort Stewart schools, as well as determining which option is most appropriate. Table 10 presents comparative statistics for a number of characteristics influencing the feasibility and ease of a transfer.

School Population. Section 6 schools are fairly large in comparison with the county. The ratio of Fort Stewart to Liberty County enrollments is 1:4.7. If the base schools were transferred to the county, they would make up about 19 percent of the school population. This actually underestimates the total contribution of the base dependents to that school population because base 7th through 12th graders already attend Liberty County. If all of the students living on the base are counted, a transfer would mean that one-quarter of the county's projected 8,500 enrollment would be from the base. One-third of the current school enrollment are military dependents who live off-base. A transfer of the Section 6 schools would result in one-half of the total county enrollment being military dependents.

Whereas the base population has remained fairly static, the county school population has been increasing at a rate of 300 pupils per year. Moreover, both systems deal with transient populations. Because such a

Table 10

COMPARISON OF SCHOOL DISTRICTS

Item	Fort Stewart		Liberty County
FY 1987 enrollment	1,551		7,250
(Ratio base to county)		(1:4.7)	
Grade span	K-6		K-12
Number of schools	2		6
Elementary	2		4
Middle			1
High School			1
FY 1987 PPE	$3,412		$1,899
Pupil/teacher ratio[a]	17		19

[a] Calculated as enrollment/total teachers. Fort Stewart based on 1987; Liberty County on 1986.

large proportion of the county population is military dependents, Liberty County has one of the highest turnover rates in the state, with an average of 700 students entering the system and 400 leaving it during the course of the year. The base has a turnover rate of about 50 percent.

Interactions Between the School Systems. Because base schools provide only elementary education, approximately 600 junior and senior high students living on base go to county schools. The Section 6 schools align their program with the county's program to ease students' transfer to junior high school.

Facilities. Both the base and the county have significant unfunded capital outlay needs. Fort Stewart's two facilities were built in 1965 and 1982, and the older structure is no longer adequate to house all of the students. A total of 14 mobile classroom buildings are used at both sites, and three temporary World War II buildings accommodate students assigned to the older school. The Department of Defense, which has responsibility for programing construction funds, has not obtained the construction funding needed for additions to replace the temporary classrooms. In addition, there are a number of other capital improvement projects, such as expanded cafeterias and playground renovations. The base's unfunded construction needs total about $3.5 million.

Liberty County has had a number of construction projects to accommodate the growing population, including a new elementary school next school year and a sizable expansion of the high school. The state of Georgia has funded all but about $500,000 of the total $8.7 million cost of these projects. However, Liberty County has used up the next five years' worth of state entitlement for construction. Yet overcrowding persists in some of the schools.

Liberty County would want to take over the base facilities if a transfer occurred. There simply is not room for the base students in the county schools. County officials also perceive that the addition of the base facilities would improve the county's access to state capital outlay funding. Therefore, the county would be willing to take over the base facilities in their current condition, even though one facility has major construction needs.

Ownership and Access. Fort Stewart is an open base and Liberty County already buses children on and off of the base with no problems. The two Section 6 facilities are located well inside the base perimeter near housing areas. If a transfer took place, the county would want to take over the facilities. However, the base representative with whom we talked would prefer a long-term lease arrangement.

LEA Financial Resources. The major source of revenue for the Liberty County school system is from the state of Georgia, which contributed about 68 percent of the county's O&M receipts in SY 1985-1986. The county's dependence on the state is greater than the statewide average which is only 58 percent.

In the same year, the county received some 19 percent of its revenues from local sources, compared to a statewide average of 37 percent. The county board of education has control of the budget and decides the millage rate. The board raised the rate in FY 1988 from 11.75 mills to 12.5 mills. This is well above the minimum 5 mills required by the state for receiving state aid; however, it is also well below the average Georgia school district levy of 15 mills.

Approximately 13 percent of the county's revenue came from federal programs in SY 1985-1986. Sources included Chapters I and II, Title VIB, and federal Impact Aid. Impact Aid accounts for about one-half of the federal contribution and, because 59 percent of the Liberty County school enrollment is federally connected, Impact Aid is potentially a major source of revenue. Currently, Liberty County receives Super B funding for the federally connected students living off-base, and Regular A funding for the 7th through 12th graders living on-base. As the U.S. Department of Education has shifted funding from the B to A categories, school systems like Liberty County have been receiving less compensation. In the past, Liberty County had no desire to take over the base schools. However, with this funding shift, the county has changed its position and now desires a transfer of the Fort Stewart schools for financial reasons. Such a transfer would reclassify the county from a Regular A to Super A status. The difference in federal aid would be about $1,000 per A category student. Under 1987 guidelines, Liberty County would receive $1,659 per base student in compensation for a local contribution of only $350 per student. Impact Aid, together with state aid, would produce about $2,950 for each Section 6 student.

School Board Voting and Representation. Liberty County recently changed the method of school board selection. In the past, members were appointed by a grand jury and the school superintendent was elected. In 1987, the county switched to a seven-member board, elected by district. At the end of the current superintendent's term of office, the superintendent will no longer be elected but appointed by the school board.

To qualify for board membership, a candidate must have resided for two years in the county and six months in the district. Fort Stewart is included in one of the districts, but it is highly unlikely that base residents would qualify for office.

County officials see no possibility that the base could have a voting board member. They point out, however, that the garrison commander has always served in a liaison capacity with the board. The current garrison commander has found the board responsive to his requests. However, base parents perceive access to the board as limited. Requests to speak to the board must be approved in advance and then can be addressed only to the board chairman.

School Assignment. Under 1970 court order, Liberty County has an affirmative action program. The county follows a neighborhood school concept but the schools are zoned to approximate the county's racial mix. Both the middle school and the high school serve the entire county. As a result, the county transports 90 percent of the students.

If a transfer took place, county officials indicated base students would continue to attend the facilities on base. The population mixes of the base and county are somewhat similar, although the base has a larger Hispanic and Asian population.[1]

Although base students would probably continue to attend base schools, Liberty County also would want the option of assigning off-base students to the base facilities to alleviate some of the overcrowding in the county schools. Both state and county officials argue that once the Section 6 schools are transferred, the local school board has sole authority over school policies and assignment. Base leaders are concerned that assigning off-base students to base facilities would adversely affect military control over the base.

Employee Status. The Fort Stewart Dependents School employs 185 employees, including 101 teachers. About 12 percent are general schedule employees, 7 percent are wage grade employees, and the balance are contractual employees.

Many of the employees, including teachers' aides, general service, and wage grade staff, belong to the Fort Stewart Association of

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[1] The racial mix of the county school population is approximately 52 percent white, 41 percent black, and 7 percent other. The mix of the base school population is approximately 42 percent white, 44 percent black, and 14 percent other.

Educators (FSAE). Affiliated with the Overseas Educators Association and National Educators Association, the FSAE has negotiated an agreement on noneconomic issues, such as employee rights, working conditions, and grievance procedures. The chief concern of the union has been job security. If a transfer took place, the future existence of the FSAE would be doubtful. Georgia state law prohibits collective bargaining. Local school officials indicated that the union might remain as a professional association, but without negotiating power.

A number of issues would affect the Fort Stewart teachers if the base schools were transferred to Liberty County:

Job security. Liberty County has been experiencing a teacher shortage. The county would want to hire the base teachers and positions would also be available for most of the base support staff.

Salary. The base employees might be hired in at lower salaries. Both Fort Stewart and Liberty County base their teachers' salaries on the Georgia state minimum salary schedule, but Fort Stewart offers a 15 percent supplement, whereas Liberty County offers only 7 percent. Table 11 illustrates the resulting differences in the teachers' salaries for various levels of education and years of experience.

Tenure. Out-of-state transfers attain tenure at the signing of their fourth-year contract; in-state transfers may attain tenure after a one-year probation. Liberty County has indicated that it would treat base teachers as out-of-state transfers.

School assignment. The county's court order requires about 30 percent minority membership in the faculty of each school. Because the base schools fall below this ratio, with minorities making up 14 percent of the teachers, some adjustments in school assignment would have to be made.

Benefits. Liberty County offers employees the Georgia State Health Benefit Plan, Social Security, and the Teachers Retirement System of Georgia.

The state retirement program, which is considered to be better than its federal counterpart, allows individuals to purchase up to ten years of credit after six years of service. Because the Fort Stewart schools

Table 11

DIFFERENCES BETWEEN THE FORT STEWART AND
LIBERTY COUNTY SALARY SCHEDULES
(1987-1988)

Years of Experience	Fort Stewart Teachers' Salaries ($)	Liberty County Comparison ($)
Bachelors degree		
Beginning	$20,092	-$1,577
10 years	23,857	-1,545
Maximum	26,332	-1,511
Masters degree		
Beginning	23,108	-1,815
10 years	27,435	-1,776
Maximum	30,305	-1,762
Education specialist		
Beginning	26,083	-2,022
10 years	31,012	-1,018
Maximum	34,236	-1,981

have had a high rate of staff turnover, 72 percent of the teachers and 83 percent of the support staff have less than ten years of federal employment and, therefore, could purchase equivalent years of credit in the Georgia program. Of the remaining employees, 10 percent of the teachers and 5 percent of the support staff have 20 or more years of federal employment.

OTHER CONCERNS RAISED BY THE PARTIES TO A TRANSFER

A persistent theme of the parents and base leaders interviewed was the belief that base children's quality of education would be adversely affected by a transfer. A number of factors contributed to this perception.

First, parents perceived that the Fort Stewart schools are better geared to the transient life-style of the military child. The Section 6 schools are flexible in applying the somewhat rigid Georgia state regulations. For example, the Fort Stewart administration has made exceptions to the Georgia rule that only children who are five years old by September can be admitted to kindergarten or that students have to have been in the Georgia system the prior year to qualify for remedial education. The base schools' faculty was perceived as more sensitive to the pressures military service places on families. In part, this is due to the school superintendent's policy of recruiting military spouses as teachers and support staff. In addition, parents and teachers felt that mid-year transfer students get prompter attention, both in terms of the necessary paperwork, class placement, and needed testing.

More important than serving the needs of the military child, parents perceived that the base schools provide a quality education. A 1987 survey of base parents indicated widespread satisfaction with the Fort Stewart schools. For example, 75 percent of the parents agreed that the total educational program was of high quality, 87 percent felt the school was doing a good job of teaching basic skills, and 88 percent perceived that their children look forward to going to school each day. Parents and teachers we interviewed cited the resources and opportunities offered to base students which often are less plentiful or unavailable in the county schools. For example, Fort Stewart employs full-time art and music teachers for each school, as well as a psychiatrist for the system. The base schools have 161 computers located both in labs and each classroom. Unlike the county, the post school offers a remedial and enrichment summer program.

In contrast, base parents perceived the education provided by the county schools as below the average offered in Georgia, itself a low-ranking state.[2] In fact, Liberty County ranks low within the state on such indicators as PPE and average years of teacher certification. In SY 1985-1986, when the average PPE in Georgia was $2,744, Liberty County's PPE of $1,985 ranked 176 out of 187 school districts in the state. Moreover, the county's PPE appears to have decreased; Liberty County's reported FY 1987 PPE is $1,899.

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[2] See Appendix A in *The Transfer of Section 6 Schools: A Case by Case Analysis*, The RAND Corporation, R-3647-FMP, for a description of the state's ranking in national indicators of education performance.

Liberty County officials argued that they offer an education which by FY 1989 will be over and above the 1990 guidelines set out by the state's Quality Basic Education Act. They hope to continue to improve the education offered through such proposals as increased teachers' salaries and designating lead teachers for student counseling in each elementary school.

These county leaders perceived the transfer of the base schools as an element in the continued growth and improvement of the county system. From an educational and governance point of view, the transfer would unite the area school population within one system, whereas now the base dependents are divided between the two education systems according to grade level. However, the reason LEA officials gave for actively supporting a transfer was the financial advantages of qualifying for Super A Impact Aid and of improving the county's access to state construction funds.

Transfer of the Section 6 Schools would result in increased revenue for the county. If, for example, the base schools had been transferred to Liberty County in 1987, the overall impact would have been to increase the overall average PPE by about $281. While this would represent a substantial increase, the county PPE would still have remained far below the state average.

Some of the advantages of the transfer may disappear over the long term. For example, the county would have to count on the continued existence of the federal Impact Aid program and the distribution of Super A funding at a level which adequately compensates the county. Moreover, whereas the addition of the base schools would initially improve the county's access to construction funds, this is a one-time occurrence and the county still would have to wait several years to qualify for the entitlement.

DECISION SUMMARY

In deciding whether to transfer the Fort Stewart schools or maintain their Section 6 status, the following facilitating or impeding factors must be considered.

Factors which facilitate:

- Liberty County is the only LEA with jurisdiction over the base.
- Liberty County already educates the base 7th through 12th graders, as well as the off-base military.
- Fort Stewart is an open base and the LEA already has access to bus upper-grade students to county schools.
- Fort Stewart has only two facilities.
- Federal Impact Aid would more than compensate Liberty County for its local PPE contribution.
- Base students probably would not be affected by the county's desegregation court order and would continue to attend base schools.

Factors which impede:

- The base school population is large relative to the LEA enrollment and may be difficult to absorb.
- The LEA supports a relatively low tax rate and PPE compared to the Georgia state average.
- Base facilities have major capital improvement needs.
- LEA would like to alleviate some of the overcrowding in the county schools by assigning off-base students to base facilities.
- Base parents do not want to give up the influence they have over their children's education through electing and running for the school board. They do not want to give up a school system perceived to be geared toward the unique needs of the transient military child and the base community.

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OPTIONS TO BE CONSIDERED

Given these factors, two options should be examined: No transfer or transfer of the base students to Liberty County. The coterminous option cannot be considered because the Georgia State Constitution bars formation of any new school district.

1. No Transfer

Continuation of the status quo remains the preferable option for several reasons. First, under the Section 6 system, base children are receiving a high-quality education in a system geared to transient military dependents. Second, base parents are more likely to retain input into their children's education through the election of their own school board and the close cooperation of the schools with the base community. Third, a transfer under present conditions could penalize the base students who would continue to use outdated and temporary classrooms under possibly overcrowded conditions.

2. Transfer to Liberty County

Transfer remains a possible option, especially if new facilities can be brought in line before transfer is implemented. But many impediments exist, the most important being the long-term financial outlook. Some of the impeding factors could be ameliorated through the terms of the negotiation. The long-term financing would improve if there was a guarantee of assisted option funding should future Impact Aid payments no longer cover local contributions. Federal or state appropriations could fund needed capital outlay projects for the two base facilities. Agreements could be reached between base and LEA officials concerning school assignment guidelines and base administrative requirements should off-base children attend base facilities. Liberty County could establish mechanisms such as parent advisory councils to give base parents input into their children's education.

A transfer would probably be more successful for all involved if Liberty County did not view the merger of the base schools as a way to help address LEA financial concerns. Ultimately, the county itself should develop a wider range of funding sources to address these concerns because the funding that accompanies the base students is unpredictable in the long term.

VIII. THE STATE OF LOUISIANA[1]

Based on available indicators, Louisiana's educational system lags behind the rest of the country. The state's low wealth is a cause of its poor standing; Louisiana's per capita income ranks 47th of the 50 states and the District of Columbia, and, in 1980, the state had the third highest poverty rate for children aged 5 through 17. As a result, although the state's per pupil expenditure as a percent of per capita income ranks 13th, its per pupil expenditures rank only 37th. The state's graduation rate also ranks a low 48th.

EDUCATION

The state requires all public and state-recognized nonpublic schools to meet state minimum standards. For public schools, state certification and funding depend on successfully demonstrating compliance with the standards set by the State Board of Elementary and Secondary Education.

In addition, the state uses testing requirements to monitor progress of students and beginning teachers. For example, students cannot advance from certain grades until they have passed a state test. Nonpublic school students are also required to take these tests. Teacher candidates must pass written tests of their professional and subject area knowledge prior to certification.

A major goal of Louisiana's new governor, Buddy Roemer, is the improvement of the state's education system. At the same time, the governor is trying to reduce expenditures to eliminate the state debt. To accomplish these goals, Roemer's program restructures school financing by concentrating state funding on the instructional program and addresses concerns about the quality of education by changing some of the state's personnel policies. In his first term of office, the governor achieved passage of a reform package that includes measures shifting responsibility for transportation, utilities, and other noninstructional costs to the local parishes. In addition, the reform package abolishes lifetime certification for newly hired teachers, mandates periodic reviews of teacher performance, and requires performance ratings of Louisiana schools.

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[1] Some of the Louisiana nomenclature differs from other states in the study. Parishes in Louisiana correspond to counties. A school district in Louisiana is a subdivision of one school system. A school district does not exist as an independent school system.

SCHOOL FINANCING

State education funds are derived from the general fund. The level of funding available through the general fund is heavily dependent on the state of the petrochemical industry. In recent years, the state has gone "from riches to rags" in conjunction with fluctuations in the price of oil. One recent newspaper article described the state as being in "its worst financial crisis since the Depression";[2] the governor estimates the state deficit to be over $1 billion.[3]

State funding, which covers an average of 48 percent of the expenditures of an LEA, is allocated through the Minimum Foundation Program (MFP), which guarantees equalization of basic educational funding. Governor Roemer's goal is to reduce state funding by about 25 percent. His reform legislation gradually shifts responsibility to the parishes for $345 million in noninstructional costs. At the same time, the legislature increased the FY 1989 education appropriation by about 11 percent over last year. The MFP funds had declined by about four percent from 1985 to 1987.

At the same time, the governor would like to increase teacher salaries and lower the pupil/teacher ratio. In 1987, Louisiana teacher salaries ranked 48th in the nation, and the pupil/teacher ratio ranked 37th. The governor's 1988 reform measure increases teachers' salaries by five percent, at a cost of $66 million.

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[2] *Education Week*, Vol. 7, No. 28, April 6, 1988, p. 12.
[3] *Education Week*, Vol. 7, No. 34, May 18, 1988, p. 10.

Local parishes are constitutionally required to raise five mills in local taxes. Parish school boards levy and collect local taxes, but need voter approval to levy beyond the required minimum millage. All local funding is derived from property (ad valorem) and sales taxes, with some earmarked for specific uses, such as teachers' salaries. In general, there is a heavy reliance on sales taxes to fund education.

The state does not provide funds for capital outlay. These funds are typically provided by parishes through ad valorem taxes or bond issues. The state also does not fund the purchase of school buses. As a result, over one-half of the parishes in the state contract out their bus services. State funds for the operation of transportation services, including a minimum salary for bus drivers, will be phased out under the restructuring of the state school finance system.

STATE POLICIES AND THE SECTION 6 SCHOOL

The state currently has only one Section 6 school, at England Air Force Base in Rapides Parish. Its status, according to the state, is that of an approved, nonpublic school. There are other military bases in the state, such as Fort Polk in Vernon Parish, but the local parish school systems educate all of the military children living on base in these parishes.

The following detail the major issues concerning a transfer from the state's perspective.

Jurisdiction. The state recognizes its obligation to educate all children residing within its borders. The state will, therefore, contribute its share of funding to Rapides Parish should a transfer occur.

Financial Burden. The Section 6 School at England AFB has a enrollment of about 650 students; this small number of students would not create a financial burden at the state level. The state did point out, however, that Impact Aid funding would not cover the local contribution at current funding levels. Moreover, it is very likely that the local contribution will be rising as the state phases out its support of noninstructional costs. Therefore, the shortfall in Impact Aid funding would increase.

Coterminous Option. The coterminous approach does not appear to be feasible. With the exception of two independent city systems, all of the school systems are parish-wide. Although not illegal, the creation of a new school system requires special legislation, and state officials have no interest in creating a separate school system at England AFB.

Facilities. State policies concerning facility ownership, access, and acreage would influence the negotiated terms of a facilities transfer. The state does not require the LEA to have fee simple title before it will disburse educational funds; Louisiana would accept either a long-term lease or a donation agreement for the transfer of facilities. In the latter case, the base could agree to donate the facility to the parish with the stipulation that the building be used as a school; if and when it is not used in this manner, ownership would return to the base. State officials did emphasize, however, that state and local education personnel must have access to the facility at all times. Finally, the state mandates minimum acreage for school facilities, although this can be waived for existing facilities and/or under special circumstances.

Employees. A number of state policies would affect the transfer of teachers from Section 6 to Rapides Parish employment. State officials believe that from the viewpoint of the teachers, the issues of tenure and retirement benefits could be the most difficult to reconcile.

Tenure. In the past, Louisiana teachers received tenure after three years and one day of employment. Under this policy, the parish school board would decide whether to grant tenure to Section 6 teachers, who are employed on the basis of annual contracts.

This issue may be moot, however, since the state legislature passed its 1988 education omnibus bill. One measure of this bill grandfathers tenure for teachers currently employed by the parish, but abolishes lifetime certification for newly hired teachers. In the future, any new employees will have to renew their certificates after periodic reviews of performance. In all likelihood, this policy would be applied to the Section 6 teachers.

Retirement. The Teachers' Retirement System of Louisiana has provisions for individual purchase of creditable service, but only after ten years of service in the Louisiana public schools. The plan appears to exclude credits for federal employment. However, the system bylaws do permit members to buy a maximum of three years of service in nonpublic schools of Louisiana, and five years of service in public schools outside Louisiana. Determination of the status of Section 6 teachers would have to be made before buy-ins could be determined.

The alternative would be to arrange a group buy-in as part of the transfer arrangement. State officials are unsure whether this would be feasible. They anticipate that it would be expensive because the state would not contribute to the financing. Teachers and/or the federal government would have to provide contributions for both the employees and employers.

Other Benefits. The state provides 50 percent toward the costs of a group health insurance program which also includes a small life insurance policy. This contribution could be reduced in the future, especially for support staff, as part of the governor's effort to reduce state contributions to noninstructional costs.

Transportation. Louisiana does not finance the initial purchase of a bus fleet. Currently, the Section 6 students at England AFB all walk to school; however, if a transfer reassigned base and local students, the LEA or the federal government would have to provide funds for the purchase of all required buses.

Governance. All school boards in Louisiana are elected, with each board member representing one district within the parish. To vote for or serve on a local board, an individual must be domiciled within the voting district, although he/she may have residency elsewhere. Thus, military personnel and their spouses may vote for a school board member, and spouses are eligible to run for the local board. However, given the small size of the base population relative to the parish, base parents are unlikely to have a real impact on board elections.

State officials stress that the parish school board will determine the acceptability and conditions of a transfer. It is not a state decision.

IX. ENGLAND AIR FORCE BASE, LOUISIANA

BACKGROUND: ENGLAND AIR FORCE BASE

Activated in 1942, England Air Force Base (AFB) is the home of the 23rd Tactical Fighter Wing, one of only four A-10 wings in the world. Besides housing the 23rd Support Combat Group, the base also hosts a number of tenants, including several weather squadron detachments, the Defense Investigative Service, and the Federal Aviation Administration. In addition, the Military Airlift Command (MAC) uses the base for the airlift of Fort Polk troops. Officers can expect, on average, a three-year tour of duty; enlisted serve three to five years.

Geography and Economy. The base is moderately sized, both in terms of geographic area and number of military assigned there. England Air Force Base is located in central Louisiana, just five miles west of Alexandria in Rapides Parish. The base's 28,618 acres take up only 3.4 percent of the parish's total land area. The base has a military population of 3,137, as well as 7,388 dependents. In addition, the base employs 476 civilians.

England Air Force Base is a major contributor to the local economy. The base has a total annual payroll of $77.2 million. In addition to the civilians, approximately 65 percent of the military and 74 percent of the military dependents live off-base. Base officials estimate that England accounts for about one-tenth of the area economy.

History of the England AFB Section 6 Schools. The major reason for the formation of a Section 6 elementary school in 1963 was segregation in the parish school system. The England AFB school was the first desegregated school in the state; the parish did not begin to implement court-ordered desegregation until a decade later.

The base school continues to educate grades kindergarten through 6th in a single facility. During the 1987-1988 school year, the England AFB dependent school reported an average daily attendance of 553.

BACKGROUND: RAPIDES PARISH

Geography and Economy. The location of Rapides Parish in the center of the state has influenced the parish economy. Too far north to be part of Louisiana's oil industry, much of Rapides' income is based on a number of institutions located in the area. In addition to England AFB, the parish includes the Louisiana State University at Alexandria, a veterans hospital, the Rapides Parish Convention and Bureau Center, and a section of the Kisatchie National Forest, including recreational areas. Almost one-quarter of the parish's 1,341 square miles is farmland.

The population of Rapides Parish has remained fairly constant over the last decade. The 1980 Census recorded a population of 135,282; estimates for 1986 indicate only a 2.7 percent increase over that census figure. Approximately one-half of the population live in Alexandria and Pineville, located across from each other on the Red River.

Parish School System. With an enrollment ranked eighth out of the 66 Louisiana school systems, Rapides Parish is one of the larger schools systems in the state. The parish provides grades kindergarten through 12th, as well as special and alternative education, to approximately 25,000 students in 51 schools.

FACTORS INFLUENCING TRANSFER

Characteristics of both school systems will affect a decision to initiate transfer and subsequent negotiations. Table 12 presents comparative data on the two school systems.

School Population. A comparison of the school enrollments indicates that Rapides Parish is more than capable of absorbing the base school. The ratio of school enrollments is 1:43. If the base school became part of the parish, it would make up only about 2 percent of the school population.

Rapides Parish already educates some 56 percent of the school-age military dependents. These include about 500 dependents living off-base, as well as the approximately 200 junior high and senior high students living on the base.[1]

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[1] In its *Application for School Assistance in Federally Affected Areas, 1987-1988*, Rapides Parish reported 515 dependents of the

Table 12

ENGLAND AIR FORCE BASE AND RAPIDES PARISH SCHOOL DISTRICTS

Item	England Air Force Base	Rapides Parish
Enrollment (SY 1986-1987	572	24,808
(Ratio England to LEA)	(1:43.4)	
Grade span	K-6	K-12
Number of schools	1	51
Elementary	1	25
K-8, K-12		4
Junior high/middle		10
7-12, 9-12		9
Alternate, special education		3
PPE ($ FY 1987)	3,393	2,851
Pupil/teacher ratio[a]	17.1	19.1

SOURCE: Louisiana Department of Education, *138 Annual Statistical and Financial Report*, and data provided by the Office of Dependents Support Policy, U.S. Department of Defense.

[a] Includes only full-time teachers.

Currently, these military dependents make up about 2.9 percent of the Rapides school population. The addition of the base school would raise that statistic to 5.1 percent.

Interactions Between the School Systems. Although the base 7th through 12th grade students attend parish schools, there is little interaction between the two school systems. The England AFB school does follow state curriculum and testing guidelines, so 6th graders are prepared to enter the 7th grade in the parish school system. In addition, base school officials arrange for severely handicapped students, who cannot be mainstreamed, to attend the parish's special education program.

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uniformed services living off-base and 213 living on the base attend parish schools. The latter statistic includes the 7th through 12th graders, as well as the severely handicapped.

There is no formalized arrangement by which the base provides input concerning dependents educated by the parish. However, the base schools officer often acts as a mediator and liaison between military parents and parish school administrators when problems arise.

School Facilities. Rapides Parish recently raised funds to improve its facilities. Parish facilities are generally used to capacity. Although school officials did not get all of the funding they requested, voters recently did pass a $28 million bond issue which will cover needed safety and health renovations. Improvements include installing air conditioning, fixing asbestos problems, reroofing some facilities, and other such renovations.

Owned by the U.S. Department of Education and under Air Force management, the England Air Force Base dependents school is well-maintained and in good condition. However, additional construction is needed. The facility consists of three buildings, including a storage area, connected by covered walkways. The facility lacks an enclosed gymnasium and needs additional administrative offices, as well as computer classrooms and reading labs to relieve overcrowding. This $2 million construction request has not been funded.

Because Rapides' school facilities are at capacity, the parish would need the use of the current base school building (or its equivalent) before school officials would accept transfer of the base students. Also, because the state requires an enclosed gymnasium or all-purpose room, the parish would ask the federal government to fund construction of such an addition as part of the transfer negotiation.

Access to the Base. England Air Force Base is a closed post, with admission to the grounds tightly controlled. Base leaders place a high priority on maintaining security because the A-10 aircraft assigned to England represent about one-quarter of the Air Force's total, active A-10 inventory.

The base commander provided several examples of how security concerns are applied to school and public transport. Rapides Parish school buses currently drive onto the base to pick up high school students. These buses are empty when they come onto the base, and when they return at the end of the school day the only passengers are base students. Therefore, security is maintained. The Alexandria city public transit system has a bus route that extends onto the base. An armed guard checks the bus before access is granted.

The base commander supports the status quo, stating that any transfer of the England AFB school administration to the local parish would raise serious security concerns. Even if only base residents attend the school, the base commander stated he would not guarantee access to administrators and faculty who are not employees of the Air Force.

To place this issue in perspective, compared to all of the other bases in our study, this base commander takes the most extreme position on LEA access. It is common practice, even on closed bases, for LEAs to operate schools on base for the sole use of students living on that base. Such is the case of the most recent Section 6 transfer which took place at Tyndall AFB in 1973. England AFB's commander states that his position is based on his perceived need to maintain control within the base. However, England AFB already has a number of tenants who do not work for the Air Force, including the Federal Aviation Administration and the Defense Investigative Service. Given the fact that many military bases already have LEA-run schools, it is difficult to comprehend why a similar arrangement could not be negotiated at England AFB.

Rapides Parish school officials are sensitive to the base commander's security concerns and are willing to limit the number of school personnel requiring access to the school building on the base. In addition to the school's staff, this would include the school superintendent, the school board representative for that district, and required parish and state supervisory personnel.

Obtaining the use of the base facility is very important to Rapides Parish officials. Without it, the LEA would view a transfer unfavorably.

LEA Financial Resources. In terms of financing education, Rapides Parish falls in the mid range of Louisiana school systems. Rapides' 1986-1987 per-pupil expenditure of $2,851 ranked 29 out of the state's 66 school systems. During that same school year, Rapides received $79 million in revenue, of which approximately 54 percent came from the state, 12 percent from the federal government, and 21 percent from local parish and district sources.[2] Rapides appears to have received a higher-than-average state contribution; state sources accounted for only 48 percent of Louisiana's total receipts for public schools during 1986-1987.

The primary sources of local revenue are the ad valorem and sales tax. The local school board can levy up to 5 mills on its own authority, but anything in excess of that amount must be approved by referendum. These additional taxes usually address a specific purpose and expire after a given number of years. For example, Rapides has taxes specifically earmarked for Operations and Maintenance (O&M) as well as for building repair and equipment. School officials feel they receive good taxpayer support. For example, in April 1987, 64 percent of the parish voters approved a one-cent sales tax to increase both the number of teachers and teachers' salaries.[3]

At a time when local contributions are increasing, federal Impact Aid revenue has been decreasing. During FY 1988, Rapides Parish received only $382,000. School finance officers have budgeted only $116,000 for FY 1989. Because Rapides educates the base high school students, the parish is classified as a Regular A Impact Aid district, receiving the lowest of the three categories of "A" per-pupil payments. The addition of England AFB elementary students would not change the parish's Regular A status. Impact Aid would not begin to reimburse Rapides for its local contribution toward the education of military dependents living on base. During FY 1988, Regular A school districts qualify for payments of $629, although several school districts reported to us that they actually received a much lower Regular A payment. That same year, Rapides Parish's local contribution amounted to about $900 per-pupil, an amount significantly higher than the Impact Aid allotment.

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[2] The federal, state, and local government contributions do not add up to 100 percent because other sources of revenue, such as investments and gifts, accounted for an additional 12.6 percent of Rapides Parish's total receipts during the 1986-1987 school year.

[3] The parish used the funds to improve its pupil/teacher ratio by hiring 135 additional classroom teachers. Also, the parish was able to provide a $5,000 supplement to the state salary schedule, thereby increasing the mean salary of all full-time teachers by about $3,000 from the 1986-1987 to the 1987-1988 school years.

This gap between the parish's local contribution and impact aid is likely to increase as recent state legislation forces the parish school systems to increase local financing of the schools. In 1988, the state enacted an omnibus education bill which gradually shifts financial responsibility from the state to the parishes for transportation, utilities, and other noninstructional school costs.

Finally, LEA financing of capital outlays influences the question of transfer. The state provides no assistance for capital outlay needs, so school systems must rely on their own ability to raise bond issues or ad valorem taxes. Rapides voters recently passed a bond referendum for $28 million toward renovation and building improvements. Although school officials did not get all they asked for, 54 percent of the voters did support bonds to address a number of health and safety requirements. This reliance on referenda makes it highly unlikely that the local parish voters would agree to finance construction of a substitute facility for the base children should a transfer take place without the use of the present base facility. For this reason, parish school officials state that either the existing or a substitute facility would have to be provided as part of the transfer agreement.

Parish officials suggest that a model for using the base facility without ownership already exists. Rapides Parish has a 25-year agreement with the local Catholic diocese to run St. Mary's School (a school for trainable mentally impaired children). Under the contract, Rapides Parish runs and pays for the school program, including the staff. However, the Catholic Church continues to own and maintain the building, even though the state recognizes it as a public school. A similar lease arrangement for the base school would allow the parish to run the program as a public school without having to finance the facility.

School Board Voting and Representation. The Rapides Parish school board has nine members elected for four-year terms, by school district. The parish is also organized into tax districts, which are the basis for raising funds for maintenance and renovations. Five school board members share the consolidated tax district which includes the base.

Each school board member has a great deal of influence over the administration of schools in his or her district, more so than in any other state in our study. For example, according to parish school officials, school board members can exercise the prerogative of approving the hiring of each professional, support, and maintenance employee in those schools.[4]

The possible role of the school board in the school's operation raises different kinds of uncertainty concerning the long-term consequences of the transfer. The current school board member stated that she could detail the role she would play in the base school's administration; however, she did not know how her successors would address the same issue. So, again, the transfer agreement could not spell out future administrative policies.

Given the highly politicized nature of the school system, base parents are nervous about losing influence over the education of their children. Although military parents domiciled within a school district can vote and military spouses are eligible to run for election, base parents realize that they still would not have enough electoral clout to win the district. Parish school officials suggest that the best mechanism for providing parental input would be through existing channels, such as the school principal or the parents' organizations. Such an approach, they say, would be more acceptable than the establishment of an ex-officio representative on the school board or a parents' advisory council.

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[4] The situation at another Louisiana military base illustrates what could happen. Vernon Parish runs two schools for grades kindergarten through 4th students living on Fort Polk. No one school board member represents the base because none of the existing school districts includes the base. With no one responsible for Fort Polk schools, the hiring of the staff has been divided among several authorities. The parish school superintendent and director of personnel hire the teachers and other professionals. Support staff hiring is divided among the 14-member school board, i.e., each district is assigned specific slots. For example, if the cook quits and that is a position assigned to School District #1, then the replacement must come from that district with that school board member's approval. As a result, military dependents have been totally excluded from support staff positions. The base schools cannot recruit from their own community.

School Assignment. Rapides Parish is under an actively monitored court desegregation order.[5] Whenever a new school is added or school attendance rezoned, the parish must submit school assignment plans to a federal judge for approval. Generally, the judge tries to maintain a 50-50 racial balance. However, in some schools, minority attendance is as low as 20 percent.

If the base students were transferred to the parish, Rapides officials would prefer to continue the status quo, i.e., run the base school for base students only. However, under the court order, a federal judge would have to approve the plan. The current England AFB school population is 30 percent minority. The ability of the parish to maintain current school assignments would be contingent on the judge's approval of that racial balance.

Past relations between the base and community on this issue have been stormy. When the parish began implementing the HEW plan for desegregation in the early 1970s, the parish used the England AFB high school students as a means of compliance, busing them long distances to predominantly minority schools. This treatment so upset base parents and leaders that the Air Force threatened to close the base unless adjustments were made. This threat precipitated changes in the plan, resulting in the magnet school system approach which is used today. However, base parents still fear that transfer to the Rapides school system could result in the parish using the base elementary school students in a similar fashion.

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[5] See *U.S. and Valley v. Rapides Parish School Board*, 07/08/69.

Employee Status. If the England AFB Elementary School were transferred to Rapides Parish, changes in staff employment would result. Currently, the England AFB Elementary School has a staff of 58, including: 25 classroom teachers, 13 professional support personnel,[6] 9 teacher aides, 5 custodial and cafeteria personnel, and 6 administrative personnel. The custodial and cafeteria staff are paid under the federal wage rate schedules for the area, whereas the balance of the employees work under contracts and receive salaries based on the schedules of comparable Louisiana school systems.

Although it is possible to determine some of the conditions under which Section 6 employees would be transferred to Rapides, much is uncertain because of the potential role of the Rapides Parish school board in the hiring process. The following discussion of employment reflects the inclinations of the current school board member who represents the district which would include the base school. The possibility exists that by the time a transfer took place, this incumbent would be retired or defeated for reelection.

Among the issues of concern to Section 6 employees are the following:

Job Security. Parish school officials would hire the Section 6 staff to the degree possible. However, they view the base school as "overstaffed," particularly in terms of resource personnel which the parish does not normally assign to each elementary school. If given a notice of one year or more before the transfer, parish administrators would try to absorb some of the additional staff, giving them opportunities at similar job openings throughout the parish. The school board member would hold the base school principal responsible for hiring both professional and support staff. This is in contrast to a common practice in the state for school board members to approve new hires, and especially to treat the filling of support staff positions as a form of patronage.

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[6] These include physical education, special education, art and music teachers, as well as a nurse, computer specialist, media specialist, speech therapist, reading specialist, and guidance counselor.

Salary. All Section 6 employees would be paid according to the Rapides Parish salary schedules and receive credit for years of experience. For the most part, this means a reduction in annual earnings. As Table 13 illustrates, the teachers' salary schedule for the base is generally higher than that for the parish. However, the difference between the two schedules is minimal for those with fewer years of teaching experience. The differences increase markedly for the more senior staff. In part, this is due to the fact that the state's longevity schedule stops at 12 years of experience, so any incremental salary steps beyond that are solely dependent on the parish's supplemental salary increases, which go up to 25 years of teaching experience. In both the base and parish systems, teachers can receive supplemental earnings through the parish's Professional Improvement Program (PIP), or the base's Teacher Improvement Program (TIP). There are some differences. Qualifying teachers in the parish can begin receiving supplemental payments after three years of experience and top out at 25 years. The base supplements do not begin until a qualifying teacher has four years of experience, but the supplements continue to increase to the 30-year level.[7] Again, the base supplements are somewhat higher than those offered by the parish program, but the differences do not become substantial until comparisons are made between those with greater teaching experience. For the majority of the base's professional staff, i.e., classroom teachers and resource staff, the differences in salaries could be substantial because 70 percent of that staff have more than ten years of teaching experience.

Tenure. Recent state legislation would influence the ability of England AFB teachers to obtain tenure in Louisiana public schools. When interviewed in May 1988, Rapides Parish officials indicated they would follow state guidelines concerning tenure. Specifically, the base teachers would not receive tenure until they had successfully completed three years of teaching in the parish school system. However, in the interim, the state legislature passed an omnibus education bill

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[7] However, after 20 years, the TIP's supplement increases at two-year intervals.

Table 13

DIFFERENCES BETWEEN THE ENGLAND AIR FORCE BASE AND RAPIDES PARISH SALARY SCHEDULES (1987-1988)

Years of Experience	England AFB Teachers' Salaries ($)	Rapides Parish Comparison ($)
Bachelors degree		
1 year	$17,246	-$ 398
8 years	19,416	- 507
17 years	22,556	- 2,020
Masters degree		
1 year	17,556	- 414
8 years	20,251	- 415
17 years	23,741	- 1,916
Masters degree + 30 hours		
1 year	17,711	- 569
8 years	20,471	- 326
17 years	24,611	- 1,803
Specialist degree		
1 year	17,911	- 327
8 years	20,951	- 344
17 years	24,891	- 1,624
Doctorate degree		
1 year	18,111	+ 60
8 years	21,211	+ 14
17 years	26,041	- 2,486

abolishing lifetime certification for newly hired teachers and requiring periodic reviews of teacher performance. In all likelihood, these new guidelines would apply to base teachers transferring to Rapides as newly hired teachers. Given the highly politicized employment process, the absence of tenure is likely to make base teachers more insecure about their parish jobs.

School Assignment. A number of factors would influence the school assignment of base personnel who transfer to Rapides Parish. First, as already pointed out, the parish would not need all of the staff currently assigned to the England AFB school. Some of the extra staff, however, would be able to transfer to the parish by accepting similar positions in other parish schools. Second, the parish is under a court order which also applies to the faculty. The federal judge's guidelines include staff assignments to individual schools which reflect the overall parish staff ratio of 25 percent minority. A leeway of plus or minus one-quarter of that percentage is permissible. In the case of the England AFB school, ten percent of the current faculty are minorities. Therefore, a transfer of the base school to the parish may necessitate the reassignment of some teachers to bring the overall faculty ratio in alignment with the court's guidelines. Finally, the potential role of the school board members in the hiring of base teachers could influence school assignment.

Benefits. Rapides offers employees the following benefits: the state employees health insurance program, a small life insurance policy of $2,500, and local/state contributions toward the state retirement plan. In addition, employees are entitled to two days of emergency leave and one day off for perfect attendance. Base staff are particularly concerned about the impact a transfer would have on their retirement benefits. The Teacher's Retirement System of Louisiana allows individual purchase of three to five years of credit after ten years of participation in their system. Under these guidelines, few base staff would be able to buy-in the equivalent of past federal service because almost two-thirds of the staff have more than five years invested in the federal retirement program. The only alternative would be for the federal government to negotiate with the state for a group buy-in option.

OTHER CONCERNS OF PARTIES INVOLVED

Local base and parish officials raised two other concerns which could make a transfer more difficult.

Uncertainty About the Terms of a Facility Transfer. All parties to a possible transfer agreement would prefer that the base children attend the same neighborhood school. Base parents, in particular, fear that busing children away from the base would make it more difficult for children to take advantage of extracurricular activities, and for schools to be an integral part of the base community. However, two factors already discussed interact in a manner which could undermine the objective of preserving a base community school.

As already noted, the LEA is under a court order requiring the federal judge's approval of school assignments whenever a new school is added to the parish. No one knows whether the federal judge would waive the current guidelines concerning the racial makeup of each school's population. However, the judge has waived these guidelines in the past, so that some schools in the parish have a smaller minority population than the base. There is, then, a good chance that makeup of the base school would remain the same.

The base commander's actions, however, could influence that decision. If the base commander decides to press his resistance against the LEA using the existing facility, thereby necessitating the construction of a replacement facility outside the secured perimeter of the base, then the judge would be less likely to waive the guidelines and more likely to order a change in the existing makeup of the school population, an order which would result in rezoning of the parish school assignments.

Quality of Education. Everyone we talked with believes that the quality of education would decline if the base school were transferred to the parish. They base their perception on several factors. First, base parents are aware that, compared to other states, Louisiana ranks very low in indicators of educational quality. Within the state, the parish falls in the mid range of various indicators of the state's school systems. The statistical rankings for the 1986-1987 school year illustrate this. Of the state's 66 school systems, Rapides Parish ranks 29 in per-pupil expenditure, 36 in pupil/teacher ratio, and 23 in the percentage of graduates going on to higher education.[8]

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[8] See Louisiana Department of Education, *138th Annual Statistical and Financial Report*.

Parents also perceive a wide disparity between the programs offered by the base and the parish. Base schools have greater resources in terms of personnel, equipment, and supplies. LEA officials agree that, while both school systems offer the same core program, the base school provides more enhancement and individualized attention. For example, the base school has its own music and computer teachers and its own media specialist. In the parish, these are itinerant positions and parish students get much less instruction in these areas.

Parents perceive that the base school is geared to the transient student. The base school can be flexible in applying Louisiana guidelines and tests to students coming from out-of-state and out-of-country schools. Guidance counselors and teachers test transfers to determine placement and needs. In addition, the school requires parent-teacher conferences every nine weeks and sends home reports at midterm as well as the end of each grading period.

Base parents point out that if they lose the base school, they have few alternatives. Parents we talked with would consider sending their children to live with grandparents or employing a home study program. The private schools in the area are primarily parochial schools with sizable tuitions. The base commander fears that such choices would adversely affect morale and retention.

Base parents applaud Louisiana's efforts to improve the quality of education. However, they point out that it will take time to implement the new programs, and even more time before the impact becomes apparent. Base parents, therefore, suggest postponing consideration of a transfer for another five years, at which time the changes in Louisiana's education system can be assessed.

DECISION SUMMARY

The conditions which facilitate or impede readiness to transfer the base school to local control are reviewed below:

Factors which facilitate a transfer:

- The England AFB elementary school population of 570 is relatively small. Rapides Parish has a school population of 25,000 and an established administration which could easily absorb the additional responsibility of the base school.
- Rapides Parish already educates junior high and senior high students living on the base.
- Parish school buses have access to the base.

Factors which impede a transfer:

- England is a closed base and the base school is located well within the secure perimeter. For reasons of security and control, base leaders say that they will not grant access to a school staff working for the LEA.
- Rapides Parish schools do not have room for the base students. Parish officials would resist any transfer which did not include the existing or an equivalent facility.
- The base facility does not meet state requirements because it lacks a gym or all-purpose room. The parish would not fund the addition to the building.
- A federal court monitors school assignments in Rapides Parish. The base school does not conform to the judge's guidelines concerning racial balance. Busing and rezoning of school assignments would result if the court did not waive the guidelines.
- Impact Aid would provide only about one-half of the cost to Rapides Parish of educating the base students. At the same time, state legislation requires increased local funding of education.
- Parish school board members have the prerogative of exercising influence over the administration of schools in their district. Base parents would have little or no influence in the election of school board members.

- The quality of the education of the base students would decline. Rapides Parish could not offer the education enhancements currently provided by the base school.

OPTIONS TO CONSIDER

Two options can be considered: No transfer or transfer to Rapides Parish using an assisted option. The coterminous option is not a viable alternative in Louisiana.

No Transfer. All of the interested parties are satisfied with the present arrangement and would prefer to continue the status quo. Base parents feel their children receive an excellent education and base leaders view the existence of the school as contributing to morale. LEA leaders are also happy with the current arrangement which allows the base school to provide services designed to help children cope with the demands of the military lifestyle.

Transfer to Rapides Parish with the Assisted Option. Transfer to the parish requires resolving a number of issues. The single greatest impediment is the provision of a facility as part of the transfer agreement. The most obvious solution--continuing to use the present facility--faces a number of hurdles. The base commander would have to grant access to LEA employees, the judge would have to review the school assignment, and a gym would have to be constructed. If the base facility cannot be used, then resolution of the issue becomes more complicated. Funding would have to be found to build an equivalent facility off the base and to transport the base children who currently walk to school. The judge would still have to approve the school assignment and there would be a greater likelihood that rezoning of school assignments would result. If no facility is provided, busing of base children and overcrowding of parish schools would result, a situation that would only fuel resentment on the part of both the base and the LEA.

Transfer negotiations could address another issue--the financial burden imposed on the LEA--by arranging for an assisted option to make up the shortfall between Impact Aid and local contributions.

Finally, if a transfer took place, base parents would have to accept the loss of governance and the extensive role parish school board members play in the administration of each school. However, negotiations could alleviate some concerns by providing mechanisms, such as a school advisory council, which facilitate parental participation in the education of their children.

X. THE STATE OF NEW YORK

The state of New York has one of the largest school programs in the country. Historically it has ranked in the top ten states of the nation in terms of education performance indicators, such as per-pupil expenditures or expenditures as a percent of income per capita. However, it ranks with the bottom ten states in terms of graduation rates.

EDUCATION PROGRAM

The state tends to have decentralized administration of education governance. It has approximately 700 school districts, each with tax levying authority. The state, however, does exercise strict control over education curricula, graduation requirements, and testing. Unlike some of the states in the south where Section 6 schools are located, New York has always placed heavy emphasis on education.

The state has a strict set of curricula and graduation requirements that govern all students and educational programs. Achievement of educational standards is evaluated based on statewide examinations. The state requires several sets of exams in kindergarten through the eighth grade, including the Pupil Evaluation Program exams in grades three and five and Preliminary Competency Tests in grade eight. All students enrolled in Regent's or core curricula classes in grades nine through twelve must pass statewide subject area exams. In addition, the state also requires that students pass the Regent's Competency Tests in reading, writing, and mathematics prior to graduation.

SCHOOL FINANCING

State education funds are derived from sales and income taxes. On average, the state contributes 41 percent of a district's per-pupil revenues. Local communities, aside from New York City, are restricted to property taxes, user fees, and utility taxes to raise school revenues. Local districts qualify for state funding based on equalization formulas. The state pays for 75 percent of construction funds.

STATE POLICIES AND THE SECTION 6 SCHOOL

State officials raised a number of concerns and policy issues when asked to consider taking responsibility for the Section 6 schools at West Point.

Jurisdiction. First and foremost, the officials interviewed rejected the notion that the state had any jurisdictional authority. In 1791, the state of New York ceded all jurisdiction for West Point to the federal government. Since then, the West Point Military Reservation is not considered part of New York State. This has been established as a fundamental principle over many decades.

The state of New York has never compromised this stand in documents or legal opinions. For instance, although students residing on West Point but attending high school at Highland Falls may take the Regent's scholarship examination, they are unable to accept the scholarship if they qualify. The state has ruled, despite the fact that West Point students continue to achieve qualifying test scores, that the students who live on West Point are not residents of the state and, therefore, are ineligible. Furthermore, courts have upheld the state on the issue of whether West Point residents are residents of the state. Recently, a member of the LEA board of education moved on to the military reservation. The court ruled he was no longer a state resident and removed him from his public position. In addition, no local community or county defines the military reservation as being within its territory. In short, the reservation is a jurisdictional donut hole in the middle of the state.

State officials made clear that, even if the LEA takes responsibility for educating the Section 6 children, by law the LEA cannot enter the base to educate them. The children would have to be escorted off the base to attend local schools.

We asked if the jurisdiction of the reservation could be ceded back to the state. The state education officials replied that, indeed, the federal government could attempt to do that, but the state was under no obligation to accept the jurisdiction and, in fact, would not. They made the point clearly, again and again in the course of the interview, that the LEA and the state had no educational obligations concerning the base population.

Financial Burden. Because the state accepts no responsibility for base children, officials did not believe the financial burden of educating the base children would ever be an issue. However, if for some reason the LEA accepted responsibility for the children, then state funds would be allocated to the new LEA students. This is exactly what has occurred for the West Point high school students. The LEA is responsible for making up the difference in expenditures between state and federal funds with local revenues.

State officials insisted that they would not encourage the LEA to accept students requiring additional local tax dollars given current conditions. The Highland Falls LEA, being surrounded by the military reservation, has no prospects for growth or increasing the tax base. Therefore, any increase would have to be covered from increasing taxes on the current taxpayers or from federal revenues. Local taxpayers must approve the education levy on an annual basis. It is very unlikely that taxpayers would vote to increase their taxes in this way. Finally, if shortages in revenues were made up by the federal government, the state would insist that the sources be more certain than the current Impact Aid contribution.

Options. State representatives noted that all options appear to have legal obstacles. Transfers are not possible unless jurisdiction is ceded, an unlikely event. The coterminous option would require a special act of the legislature, which also seems unlikely. A contractual option appears most practical; however, the LEA could not form a contract with a group requiring it to educate students outside of its own jurisdictional territory. The LEA can only form a contract if students are brought into its bounds. It may not go outside its boundary to educate students. The LEA currently educates West Point high school students and students from the town of Garrison, but these students are transported to the LEA by West Point and Garrison.

Facilities. The ability to use existing facilities has legal barriers. The base schools and land would have to be ceded in full to the LEA before it could accept ownership. However, unless the jurisdiction was ceded, the LEA could not own property outside of its territory or have access to it. Two other possibilities exist: leasing or a gift. The LEA could use a 99-year lease to accept the facilities or could accept them as a gift. Both would require a covenant that restricted use to educational purposes.

Without the use of facilities, state representatives noted that the LEA would be very unlikely to accept transfer. If a transfer of facilities could somehow occur, the state would not encourage the LEA to accept the facilities unless the facilities met state codes, had no asbestos problems, and the LEA had free access.

Employees. The state has several laws that would affect the status of the Section 6 employees in a transfer. First, all teachers must be state certified. Tenure is conditional on residence. Out-of-state teachers cannot receive tenure until after three years. In-state teachers have a two-year probationary period before tenure is granted. Because of the jurisdictional complications, it is unclear if the Section 6 teachers can be considered in-state for these purposes. Seniority cannot be transferred. Thus, all Section 6 teachers would lose their seniority. Salary and longevity clauses would be up to negotiations between the LEA and the Section 6 schools. The state does not provide for a minimum salary. There is no provision for buying into the state retirement system for out-of-state teachers. Because of the status of the reservation, officials believe that the teachers would not be able to buy-in to the New York system.

Transportation. If a transfer was accepted, the LEA could receive state funding for the buses involved so long as the buses did not cross the LEA jurisdictional boundary. Thus, to qualify for transportation reimbursement would require a ceding of jurisdiction and territory to the LEA.

Governance. The state requires a board of education, elected by the community. The board has the power to levy taxes with approval from the voters on an annual basis. Elected officials must be 18 years of age, residents in the district for one year, and U.S. and state citizens. Newcomers to the district must be residents of the district for 30 days prior to declaring residency and becoming eligible to vote in an election. Past court cases have established that base residents are not legal residents of the state and are ineligible to run for office or to vote in state elections.

XI. U.S. MILITARY ACADEMY, WEST POINT

BACKGROUND: USMA, WEST POINT

West Point is the Army's academy for the training of officers. It was authorized in 1791 by an act of Congress and established in 1802. The 4,400 cadets who attend the academy are not allowed to bring dependents. All dependents living on the reservation are connected to the military professionals and support staff who educate and train the cadets. The professors at West Point, unlike other Army assignments, are volunteers. They volunteer to teach at West Point for five-year periods, at the risk of removing themselves from normal chain of command opportunities. Some become permanent staff at the academy. All military at the academy must live at the academy or in the nearby Stewart Army Sub Post. Thus, the LEA has no military dependents from West Point.

Geography and Economy. The military academy is located 50 miles north of New York City in the Catskill Mountains along the west side of the Hudson River. It is bordered on the east by the river, on the south by the town of Highland Falls, and on the other sides by mountains and federal and state forest and mining lands. Only a single main highway accesses West Point from north to south. No roads access it from east to west. This geographic isolation has resulted in West Point growing very self-sufficient, providing all required services to its military community. The reservation covers 16,000 acres. Reservation housing is located primarily on land near the river.

West Point is a major economic entity in the area. It expends about $270 million annually. In September 1989, it employed 898 officers, 15 warrant officers, and 750 enlisted personnel. It also employed 2,433 civilians and a large number of contractors. In addition, the 4,400 cadets are housed at the academy. It is a major employer of residents of Highland Falls; local officials estimated in 1988 that approximately 75 percent of Highland Falls residents are somehow connected to the academy. Because of the mountain terrain, close proximity, and limited road access, West Point is oriented to Highland Falls, rather than other towns in Orange County.

Because of crowded conditions at West Point, some West Point military live at the Stewart Army Sub Post and commute to West Point. Sub-post residents' children, however, attend Washingtonville schools.

History of West Point Schools. At least as far back as 1816, historical records show that a dependent school existed at West Point. The school was officially authorized as a necessary part of the academy by the U.S. Congress in 1821. Up to 1900 the academy did not provide for education beyond the eighth-grade level. In 1896, the Highland Falls school district was created and in about 1900 the first academy high school students were sent there. In 1952, the lower school was incorporated into the Section 6 system and educated kindergarten through eighth grade.

The schools have never been a part of the local community nor have academy residents ever received a free education from the LEA. The LEA educated the academy high school students using Impact Aid funds and grants from the state government in lieu of tuition. However, in recent years this funding was not enough to cover the cost of educating the academy high school students. A new arrangement was needed. The academy high school students still attend the LEA schools, but under a contractual agreement. This agreement provides that the state will fund a normal state share for these students as if they were residents. The federal government contributes the remaining amount to bring the funding of the academy high school students up to the average local per-pupil expenditure. The contract is reviewed annually. Thus, the base has its own Section 6 school for kindergarten through eighth grade and a Section 6 contract with Highland Falls for grades nine through twelve.

BACKGROUND: HIGHLAND FALLS-FORT MONTGOMERY

Geography and Economy. Highland Falls, the town adjacent to the academy, had a population of 4,350 in 1987. The town of Fort Montgomery, which is included in the LEA school system, had a population of 1,700, making the total population of Highland Falls-Fort Montgomery equal to 6,050 in 1987. The town grew up next to the academy in large part to provide needed services. Like the academy, it is surrounded by the mountains and river, with little room for growth.

At one time, its taxable land area was considerably larger; however, shortly before World War II, both the federal and state governments removed large tracts of land from the town's tax rolls. Highland Falls is essentially hemmed in by the academy and forest and parklands. Some 93 percent is exempted from the tax rolls because of federal and state use. Only seven percent remains on the tax rolls.

The economy is basically service oriented. Surprisingly, few residents commute to New York City for work. The community has remained relatively unchanged for many years. There has been about five percent growth rate in the county in recent years, although Highland Falls has grown no more than one percent a year. As of this writing, there were only 15 sites available in the town to build on, and a moratorium had been placed on construction.

School District. In New York, school districts are formed by towns, not counties. Highland Falls has a very small district. It includes the small town of Fort Montgomery to the south. Local enrollments are approximately 810 in kindergarten through the 12th grade. In addition, Garrison, a town across the Hudson, sends about 70 children on a tuition basis to Highland Falls schools. The small town of Garrison cannot maintain its own schools and has chosen Highland Falls to educate its high school students.

FACTORS INFLUENCING TRANSFER

Table 14 presents comparative statistics for a number of characteristics influencing the feasibility and ease of a transfer. The following are some of the issues that must be considered.

School Population. The school populations in the academy and LEA are about equal. Neither is expected to grow in the future. Highland Falls educated about 1,090 students in 1988: 260 in kindergarten through the 3rd grade, 271 in grades 4th through 8th, and 560 in grades 9th through 12th. Of the 560 high school students, 278 are from

Table 14

WEST POINT AND HIGHLAND FALLS SCHOOL DISTRICT

Item	West Point		Highland Falls
Student population (SY 1988-1989)[a]	885		880
Enrollment	675		1,091
Ratio base population to LEA		(1:1)	
Enrolled grade span	K-8		K-12
Number of schools			
Elementary	1		1
Middle	1		1
High School	0		1
PPE $ (SY 1988-1989)[b]	$5,758		$8,129

[a] This puts the 210 West Point high school students in the base student population, but they are included as Highland Falls enrollees.

[b] West Point expenditures are taken from a computer printout from the Office of Dependents Support Policy. Highland Falls data come from unpublished material provided by the Superintendent of Highland Falls-Fort Montgomery Central School District on November 19, 1988.

Highland Falls, 210 are from West Point and 72 are from Garrison. The academy educated some 675 students in kindergarten through 8th grade. With its 9th through 12th graders, West Point would have a student enrollment of 885 and Highland Falls would have an enrollment of 880. Because all military assigned to West Point must live on the reservation, Highland Falls has no West Point military dependents living in the local community.

Interactions Among School Systems. Interactions between the two school systems are numerous because the LEA educates academy high school students. The two school boards meet together twice a year to discuss issues of mutual interest. Programs have been set up to introduce the academy eighth graders to the Highland Falls high school with a day-long field trip. In addition, the academy has adapted its courses to ensure that the academy eighth graders have the preparation they need for a smooth transition to the Highland Falls ninth grade.

The current contractual arrangement for the education of the West Point high school students requires that the federal government make up the difference between state funding shortfalls and the per-pupil expenditure required to meet the average for the LEA. The contract also requires that the West Point Section 6 school pay for and provide busing for the high school students because the LEA is legally unable to transport children outside of its jurisdiction.

Facilities. The number and condition of facilities is an issue in any transfer. West Point has two schools located at one site well inside the reservation perimeter. Kindergarten through fourth grade are housed in a relatively new building known as 705-A. The middle school students, grades five through eight, are housed in the older building known as 705. Building 705 was originally built in 1935 by the Army. An addition was added in 1954 with funds from the Department of Health, Education and Welfare. A 1987 addition was funded by the Department of Defense. Building 705-A was constructed by the Department of Education in 1962.

The buildings will require improvements in the future. The older building requires extensive electrical and plumbing repair, retrofitting of window areas, and upgraded gym facilities. The new building requires some window replacement. Both buildings had no asbestos problems when inspected a few years ago, although new standards now exist. The buildings have recently been inspected, but the results are not yet available. The older building may require extensive asbestos removal. The Office of Economic Adjustment does not predict major facilities improvement costs at this site.

The LEA has three schools. School officials expect no major overcrowding problems. However, Highland Falls does not have the space to educate the West Point Section 6 children in its own schools. Any transfer would require the use of existing or replacement facilities.

Ownership and Access. West Point is an open base and is the main tourist attraction in the region. LEA access to the academy poses no security or administrative problems from the view of academy officials.

State law, however, may pose some problems. As noted in the New York state discussion, school districts are not allowed to cross their jurisdictional lines to educate students, although students may be brought into the district to be educated. Thus, for the LEA to have access to the buildings seemingly requires the ceding of jurisdiction over the schools and property to the LEA. Neither the LEA nor the state seem inclined toward any changes in jurisdiction. Without the use of the West Point buildings, the LEA could not accept the responsibility for educating the academy children. It has no additional capacity in its schools and cannot afford, given the restricted tax base, to build a new school. It cannot afford additional maintenance costs. Thus, buildings would have to be in prime condition to be transferred.

Furthermore, because title to at least part of one of the buildings is held by the Army, it is not certain if the Army would want to turn this land and building over to the LEA. As it is, space at the academy is at a premium.

Using a lease or granting the schools as a gift may be a feasible solution to the problem. It is unclear if the LEA could cross jurisdictional boundaries to educate children on facilities it leased. A legal opinion would be required from the state. Using either option, however, requires that the maintenance costs of the leased or given buildings be the responsibility of the federal government. Both the state and LEA officials did not believe they could force local voters to accept the costs of upkeep on buildings not owned by the LEA.

LEA Resources. The community elects its own school board and the school board determines the amount of funds needed for educational purposes. It is not subject to oversight by the county government structure. However, all school tax levies must be approved on an annual basis by the community. If the community does not approve the budget, the board can still levy a tax to maintain last year's level of expenditures minus some transportation costs for extra curricular programs. Revenues are raised from property, utility, and use taxes.

The community regularly approves the budget; however, in the past, the amount of revenues raised have not covered all costs. The state has consistently appropriated additional funds to the LEA on an as-needed basis. This amount was over $350,000 in the 1987-1988 school year. However, the state representative who ensured this source of additional funds has been replaced. The additional grants-in-aid from the state are no longer certain. The LEA remains relatively dependent on state revenues, 54 percent of the per-pupil revenues, compared to the state average contribution of 41 percent.

If a transfer took place, the taxpayers would have to approve the additional levy needed for the education of Section 6 children that was not covered by state and federal sources. Both state and local officials believe this to be very unlikely.

School Assignment. School assignments would probably not be affected by a transfer. The LEA is under no court orders for busing to achieve racial balance. The LEA only has one school per level: elementary, middle, and high school. LEA officials did note that if they had access to the academy schools they might ship LEA students onto the base if needed space was available at West Point. There appears to be no question of busing West Point children in kindergarten through eighth grade off the academy because the academy schools are the closest schools to base housing.

Issues Related to Section 6 Employees. Aside from the students, the group most directly affected by a transfer would be the employees of the Section 6 school. The West Point schools have 56 teachers, three administrators, eight teacher's aides, and 20 support employees. All but four staff members are under annual contractual arrangements. Representatives of the teachers and support staff raised a series of concerns.

Job security after a transfer is a major source of concern for both the support staff and the teachers. The support staff worry that if a transfer occurs they will not be needed, many holding possible duplicate jobs of those held by LEA support staff. Teachers, on the other hand, worry that the LEA will have little incentive to hire them. The LEA is not reimbursed by the state for the cost of teachers. Neither does the state mandate a minimum salary level. Thus, the senior West Point teachers might be at a disadvantage if forced to compete for jobs with newly graduated teachers. In addition, the state requires all teachers be certified and several West Point teachers are not.

Teachers are also concerned about conditions of employment if they are hired:

Salary. Teachers fear they would suffer a reduction of salary. The state sets no minimum and provides no reimbursement to the LEA for teachers' salaries. With few resources to support the LEA, Highland Falls teachers' salaries are significantly lower than those for West Point, as shown in Table 15.

Benefits. New York state provides excellent teacher's benefits in health and insurance, and employees expressed no concerns in this area. Retirement benefits, however, are more problematic. New York state has no provision for out-of-state teachers buying into the New York state retirement system. Section 6 employees would lose their retirement standing in the federal system and would have to begin as new entrants to the New York state system. Given the senior nature of the teachers at West Point, this is a major concern. Of the 35 teachers, 23 have taught 20 years or more, and 12 have taught between 15 years and 19 years. Furthermore, were teachers to work for the LEA and begin a new retirement accrual, they could not retire from the New York state system without ten years of service.

Tenure and Senority. Teachers are concerned about tenure and senority. New York state requires all out-of-state teachers to teach for three years prior to gaining tenure. The state makes no provision for transferring senority from out-of-state. Thus, because West Point is considered out-of-state, the Section 6 teachers would be effectively placed at the start of a new career, if a transfer took place.

These issues were discussed with LEA officials, who say they would do all in their power to employ support staff and teachers if a transfer took place. However, they noted that the law and financial situation would preclude them from offering all that might be desired by former

Table 15

WEST POINT AND HIGHLAND FALLS SALARY SCHEDULES (1988-89)[a]

Years of Experience	West Point Salary ($)	Highland Falls Salary Comparison ($)
Bachelors degree		
1 year	$21,630	-$1,269
10 years	31,190	- 4,988
15 years	36,430	- 6,102
Masters degree		
1 year	22,630	- 293
10 years	32,190	- 4,013
15 years	37,430	- 5,128

[a] Includes base salaries, no benefits or bonuses.

Section 6 employees. They could make no guarantees about employment opportunities or the conditions of employment if a transfer occurred.

MAJOR CONCERNS OF THE PARTIES INVOLVED

LEA Financial Capability. A major concern of all parties is the financial capability of the LEA to maintain a quality education after a transfer. The LEA is heavily dependent on state funds for support. In 1988, it received about 54 percent of its funds from the state, 24 percent was raised locally, and 13 percent came from the federal government. The average state revenue contribution is about 41 percent. The addition of 675 more students to its schools would be financially crippling, unless the full costs of those students were provided by non-local sources. As with other LEAs and states, Impact Aid funds are not seen as a viable option. In fact, in the past the Impact Aid funds for West Point high school students did not cover the full cost of those students, thus necessitating additional state grants-in-aid. The financial crisis brought on by low federal funding was what precipitated

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the Department of Defense to form a contractual agreement for the education of the high school students.

In order to receive the contractual arrangement, the LEA currently gives up all other rights to Section 3, Impact Aid funds. Thus, the LEA receives no Impact Aid funds for those federally connected children now living in the community.[1] It is clear, however, that if a transfer occurred, the LEA would qualify for Super A funding. Half of its students would be military dependents living on federal property.

Under Super A status, Highland Falls would have been eligible for $2,915 per category A student in 1988. Normal state funding per pupil in 1988 covered about $4,106. We note that, although New York does not accept jurisdiction for the West Point students, it pays the state's per-pupil share because the LEA educates them. Per-pupil expenditures in Highland Falls equaled $8,129 in 1988.[2] Thus, if Highland Falls received Impact Aid, transfer would result in Highland Falls receiving $7,021 from federal and state sources, a shortfall of $1,108 per Section 6 student.

Recent federal legislation creates a possibility that the LEA could receive additional federal funding to make up that shortfall. In 1988, Congress enacted Public Law 100-297, which permits an LEA to receive both Impact Aid and Section 6 funds. However, the intent of the Congress was to provide a one-time grant of funds rather than a long-term funding arrangement. Until implementing regulations are issued, the applicability of this legislation remains uncertain.

These funding approaches cover only current expenditures, not operation, maintenance, or new construction of facilities. Without federal support, all parties are worried that a transfer of facilities would be an economic burden to the community. However, because New York state covers 75 percent of construction costs, future construction may not unduly burden the LEA.

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[1] Because it gave up all Section 3, Impact Aid funding, the LEA could not provide an estimate of the number of federally connected children in the community. We cannot estimate what the B status of the LEA would be.

[2] State and local expenditures for 1988-1989 are taken from an unpublished packet of information provided by the Superintendent of Highland Falls-Fort Montgomery Central School District on November 29, 1988.

Parental Concerns Over the Quality of Education. Military parents were concerned over the quality of education offered by the LEA. They emphasized that the program offered by the academy schools was particularly tailored to the needs of military children and the life style of the military family. Military parents stated this was especially important for children in the elementary grades. Section 6 teachers provided ample attention to each student. The schools had programs for screening new entrants and providing them with any needed services immediately. Parents valued the individualized attention given their children and the fact that parents were welcome to visit the classrooms. They believed teachers were encouraged to involve parents in the child's education and to work as partners with the parents to improve the education of the children. Parents worried that this was not the case with the LEA and would especially not be possible under conditions of a transfer.

A frequently repeated example of the schools serving the military family was that the dependents school schedule follows that of the academy as a whole. Classes begin in late August and end when the academy classes end. This allows parents and children to coordinate their holidays and vacations, thus helping to maintain attendance. The LEA does not do this, but follows the New York state schedule. This has caused some attendance problems for the academy high school students.

School Board Voting and Representation. Academy parents noted that if a transfer occurred they would lose their right to run for and elect a school board. In the LEA, school board candidates must be 18, citizens of the United States, and citizens of the state. As discussed under state law, the residents of the academy are not considered residents of the state and could not be unless jurisdiction of the housing areas was ceded to the state. Furthermore, according to academy regulations, all military must live on base. Therefore, parents of Section 6 children cannot run for public office in the LEA. Voters must be residents of the state for 30 days prior to registration. Again, no military parent could meet this requirement.

Under the contractual arrangement for the high school children, the commandant of the academy may appoint a non-voting representative to the LEA school board. This practice has been followed and accepted by all parties. A similar arrangement might be possible in the event of a transfer. Academy parents, however, may not be satisfied with this loss of control over the education of their children.

Concern of the Academy Commandant. Unlike other Section 6 school sites, the academy commandant was not worried over the security or administrative effect of a transfer. He thought these could be worked out if necessary. He was, however, very worried about the effects of a transfer on morale, recruitment, and retention of teachers for the academy.

The commandant insisted that the ability of the academy to carry out its mission rested on its ability to recruit and retain well-qualified teachers for the cadets. These teachers, being volunteers, had to be actively recruited to teach at the academy. Although teaching at the academy is an honor, it also takes a volunteer away from the prospects of command for five years. Most potential teachers--captains to lieutenant colonels--are at key promotion points in their careers. Teaching at the academy can take these officers away from potential career advancement. Thus, the commandant insisted that he has a difficult time, at best, in recruiting teachers to the academy.

He thought a transfer would negatively affect the willingness of potential volunteers to come. The commandant uses the presence of the Section 6 schools and their reputation as a recruiting incentive. A transfer to the LEA, he argued, could lessen the likelihood of volunteers choosing the academy over a field command. The commandant stated emphatically that he was against transfer, or any change, for this reason.

The commandant further emphasized that the nature of the teaching staff encouraged them to value the education of their children highly. The teaching staff are officers and college graduates, many with advanced degrees. Parents with these attributes tend to value education highly and would be concerned over the effects of a transfer.

DECISION SUMMARY

In deciding whether to transfer the West Point schools or keep them Section 6 schools, a number of facilitating or impeding factors must be considered.

Factors facilitating a transfer.

- Everyone recognizes a single jurisdiction as the likely party to a transfer.
- Highland Falls already educates the high school students under a contractual arrangement.
- West Point is an open reservation used to regular traffic comming on and off the base. Security and administrative concerns are minimal.
- Although the Section 6 schools required some future repairs, no major construction is required.
- West Point has only two schools located at one site.
- Student assignment does not appear to be a concern.

Factors that impede a transfer.

- New York state does not accept legal jurisdiction over the academy dependents. Other state laws make transfer of the facilities or LEA access difficult.
- Under current guidelines, Highland Falls would not recover the local per-pupil expenditures needed from Impact Aid and officials do not trust the continuance of Impact Aid funding.
- Military parents are concerned that their children would lose the individualized education and flexible schedule they now have if a transfer occurs.
- Military parents do not want to give up the influence they have over their children's education through electing and running for a school board.

- The commandant is concerned over the effects of a transfer on the ability to recruit and retain qualified teachers for the academy.

OPTIONS TO CONSIDER

Two options should be considered: No transfer and a contractual arrangement. The coterminous option would require a legislative act and does not seem feasible.

No Transfer. Continuation of the status quo remains a viable option for several reasons. First, under the current system, the academy children are receiving a quality education, as well as individualized attention to the transient student not available in the LEA. Second, military parents can maintain input into their children's education.

Contractual Arrangement. Because of the difficulties evident in the financing of the LEA, the most suitable transfer appears to be an assisted option or a contractual arrangement like the one currently operating for the high school students. Jurisdiction complications make the assisted option less attractive because jurisdiction would have to be ceded back to the state for the LEA to accept the transfer of the facilities. The contractual arrangement appears more attractive because the LEA would not require ownership, but only contractual access to the buildings. The federal government could still be responsible for upkeep. Furthermore, the LEA and academy already have experience with the contractual arrangement and appear to be comfortable with it. The contractual arrangement would allow reduced federal financial responsibility for the education of the academy students. The major drawback is that means must be found for allowing the LEA access to the schools across its jurisdictional boundaries.

Other Concerns. A number of concerns would have to be addressed in any transfer negotiation. These include representation of base parents to the school board and the status of the Section 6 employees.

XII. THE STATE OF SOUTH CAROLINA

Prior to 1984, South Carolina ranked near the bottom on most lists of educational quality indicators. Since the passage of the Educational Improvement Act of 1984, the state's status has begun to improve, although it is still low. For example, in 1986, South Carolina's graduation rate was 64.5 percent, up from 63.8 percent in 1982, although its ranking actually declined from 42nd to 43th. The 1986 per-pupil expenditure was ranked 41st, up from 46th in 1982. Expenditures as a percent of income per capita, however, rank South Carolina 18th in 1986, compared to 37th in 1982. This increase in rank reflects the state's increased commitment to educational improvement.

EDUCATION PROGRAM

In 1984, the state legislature passed a comprehensive bill for the improvement of the state's educational system; among other things, the Education Improvement Act of 1984 (the EIA) includes the following mandates:

- Increased student academic standards and minimum promotion criteria.
- Kindergarten programs in all districts.
- Expanded gifted and talented programs.
- Expanded early childhood development programs for at-risk 4-year-olds (to be fully implemented in 1990).
- Linking of state remediation funds to minimum pupil/teacher ratios in the LEAs.
- Annual adjustment of the state minimum teacher salary to the southeastern average.
- Development and implementation of teacher, principal, and school incentive plans.

- Formal evaluation of practicing teachers at least every three years.

The EIA is funded through a one-cent increase in the state sales tax. The program provides funds over and above those provided by the state's Defined Minimum Program (minimum foundation program, or DMP). The DMP covers, on average, 70 percent of a district's educational expenses, and includes an equalization provision. This program was enacted by the South Carolina General Assembly as the Education Finance Act of 1977. It also mandates participation in a state-wide student testing program and lowers pupil/teacher ratios in grades one through three. Students take tests annually in grades one through eleven, and in the twelfth grade if they have not yet passed the required high school exit exam.

SCHOOL FINANCING

State educational funding, with the exception of EIA funding, is obtained from the state's general revenues. On average, the state provides about 54 percent of LEA current operating funds, although the actual percentage varies widely among districts. To receive DMP funds, local districts must provide a minimum local effort which is scaled to local taxpaying ability.[1] The DMP includes all basic "at school" operating costs; it excludes transportation, capital outlay, pilot programs, adult education, food service programs, and employee benefits. DMP funds are allocated on a per-pupil basis, using a student weighting formula that increases the weights for pupils in earlier grades (where student-teacher ratios are lower), as well as for vocational and exceptional students.

State funding also covers most other programs. For example, the state currently pays about 75 percent of employee benefits and pays all transportation costs (purchase and maintenance of buses, bus driver training, drivers' salaries, operational costs). The state also provides a minimal amount of funding for capital outlays, giving districts $30 per pupil in grades one through twelve for school construction ($15 per kindergarten pupil). However, the bulk of school construction and renovation is covered by local bonds.

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[1] The South Carolina Tax Commission annually updates its determination of the fiscal capacity and full market value for each district. An index of taxpaying ability is derived from this information.

The state provides full funding for all provisions of the EIA, from the one-cent sales tax increase. EIA funds are distributed on an equalized basis.

STATE POLICIES AND THE SECTION 6 SCHOOLS

State policies and preferences influence the conditions under which the Section 6 schools at Fort Jackson, Laurel Bay Marine Corps Air Station, and Myrtle Beach Air Force Base could be transferred to local control.

Jurisdiction. South Carolina officials recognize their legal obligation to educate children residing within the state. Nonetheless, the state is opposed to the transfer of the Section 6 schools unless the federal government agrees to alleviate the financial burden the state and local districts would incur in assuming responsibility for these students' education. It should be noted that LEAs already educate military dependents living on other bases in South Carolina, such as the Naval and Air Force installations located at Charleston.

Financial Burden. State officials are opposed to the transfer of the Section 6 schools because of the added financial burden this will impose on state and local governments. State officials pointed out that current Impact Aid payments in the Regular A category cover only about $400 to $500 of the approximately $3,000 per-pupil expenditures in each district. At the state level, per-pupil costs of the minimum foundation program alone are $1,392, significantly more than that provided by Impact Aid.

State officials believe that if the Section 6 schools were transferred, state taxes would have to be increased. The state's total Section 6 enrollment is about 3,000 students, or about one-half of one percent of the state's total enrollment. A proportional increase in EIA funds would require an additional $1.3 million (based on the current funding level of $270 million) and $4.2 million in minimum foundation funds (based on the above per-pupil costs). Funds for transportation, employee benefits, and other state-funded services would also have to be increased. Thus, without a federal guarantee of adequate compensation, the state is reluctant to support transfer.

Coterminous Option. All districts in South Carolina must provide minimal local funding for inclusion in the minimum foundation program; therefore, a coterminous school district would require special legislation to be exempted from this requirement. The state would not support the establishment of a new school district that had no local tax base. This is, therefore, not a viable option in South Carolina.[2]

Facilities. The state would allow LEAs to use base school facilities under a transfer of ownership or a long-term lease arrangement. State funds for renovations, expansion, and maintenance of leased base facilities would have to be approved by the state board, which would most likely require that the local district have guaranteed access. In addition, all facilities must meet state codes--wooden buildings, for example, are unacceptable.

Governance. Local boards of education are generally elected, although a few are appointed. The procedures and rules for board membership are determined by local legislation. In the three districts in which the Section 6 schools reside, board members are elected. It is unlikely that military parents would meet legal requirements for or be able to build the community support needed for election to the school board.

In most districts, tax-raising authority resides with county commissioners who must approve the school budget and levy the needed taxes. In two of the three relevant districts, the LEA has no tax-raising authority (county commissioners retain this authority); in the third district of Horry County, a referendum was passed allowing a local legislative delegation to approve the board budget and raise the required taxes.

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[2] For a discussion of the many drawbacks to the coterminous option, see R-3647-FMP, July 1988.

Employees. Although many of the provisions and conditions for hiring teachers and other Section 6 school employees would be determined at the local level, state policies influence a number of employment conditions:

Certification. The state requires all teachers to be state-certified, a requirement that most Section 6 teachers already meet. (South Carolina teaching certificates are valid for only five years, and cannot be renewed without an additional six hours of course credits.)

Salary. The state sets a minimum salary schedule for all teachers; districts may supplement this salary with local funds. The salary schedule is based on years of experience and educational level, with the former being determined by years listed on the state teaching certificate. Section 6 teachers who are state-certified would, therefore, receive full credit for their years of experience if they transferred to an LEA.

Retirement. South Carolina teachers are enrolled in a retirement program operated by State Retirement Systems. The program allows for full retirement at age 65, regardless of years of experience, or after 30 years of experience, regardless of age. Buy-in provisions exist for individuals who have worked for the federal government, but the cost of the buy-in is prohibitive--ten percent of current salary for each year purchased. There is also a precedent for a group buy-in: During the consolidation of a few private colleges with the state university system, a group buy-in was arranged for college faculty. However, the buy-in was very expensive.

Because of the importance of retirement security to individual teachers, and the prohibitive costs of transferring retirement benefits, this is likely to be one of the major issues in any transfer arrangement.

XIII. FORT JACKSON, SOUTH CAROLINA

BACKGROUND: FORT JACKSON

Established in 1917, Fort Jackson's major mission is to conduct basic combat training. One of the largest infantry posts and replacement centers in the nation, the fort trains 61,000 soldiers on a yearly basis. Headquarters of the 120th Army Reserve Command, approximately 16,000 military are assigned to the post. Of this number, some two-thirds are trainees or drill sergeant school students. The average tour of duty for non-trainees is three years.

Geography and Economy. Although most bases are located outside urban centers, Fort Jackson was incorporated into the City of Columbia in 1968. The post's 52,303 acres (47,795 acres are a wildlife area) represent approximately 75 percent of the city and 11 percent of the county land.

As is the case of most bases, Fort Jackson makes a substantial economic contribution to the surrounding area. In FY 1987, the post employed approximately 4,300 civilians on a $58 million payroll. The military payroll exceeded $240 million, whereas services, supplies and equipment purchased totaled $141 million. In addition, although only about 15 percent of the assigned military reside off the post, over three-quarters of the military dependents live off the base.

History of the Section 6 School. Founded in 1963 because of segregation in the local schools, the Fort Jackson dependents schools serve an elementary (kindergarten through sixth grade) school enrollment of approximately 1,000 in three facilities. Although the post has been incorporated into the city of Columbia, base secondary (seventh through twelfth grade) school students attend public schools in the Richland County School District Two, which serves a suburban area around the city. Prior to 1963, all base students attended Richland District Two schools.

BACKGROUND: RICHLAND COUNTY

Population and Geography. Located in the center of South Carolina, the county's 1986 population of 274,600 was the third largest in the state. About one-third of the population is in the city of Columbia, the state capitol and the location of the University of South Carolina and Fort Jackson. During the past decade, the inner city has lost population to the growing suburbs, and Richland School District Two covers one such area, changing rapidly from a rural to suburban area.

Richland County School District Two. Richland Two was formed in 1952, the product of the consolidation of two suburban school districts. Located in the northeastern section of Richland County, the school district serves approximately one-third of the county's land area. Richland County School District One is responsible for the balance of the county, including the city of Columbia. Richland Two currently enrolls over 11,000 students in 14 schools, including approximately 350 base secondary school and handicapped students living at Fort Jackson.

FACTORS INFLUENCING TRANSFER

The following factors should be considered in an analysis of transfer options. Table 16 presents data comparing characteristics of the base and Richland Two school systems.

School Population. Fort Jackson's Section 6 school population is relatively small compared to that of Richland Two. Less than 3 percent of the Richland Two school population lives at Fort Jackson. The addition of the Fort Jackson Section 6 elementary school population would raise it to 10.6 percent.

These statistics understate the total impact of the Fort Jackson school population since Richland Two also educates about 1,000 military dependents living off the base.[1] Thus, if the Section 6 schools were transferred to Richland Two, 18.5 percent of the school population would be military dependents living on and off the base.

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[1] Military dependents living off the post attend both Richland school districts as well as two school districts in neighboring Lexington County.

Table 16

FORT JACKSON AND RICHLAND SCHOOL DISTRICT TWO

Item	Fort Jackson		Richland Two
Enrollment (1988-1989)	982		11,188
(Ratio Jackson to LEA)		(1:11)	
Grade span	K-6		K-12
Number of schools	3		14
Elementary	3		8
Middle	-		3
High School	-		2
Special	-		1[a]
PPE (1986-1987)[b]	$3,330		$3,004
Pupil/teacher ratio	16.4		19.4

SOURCE: South Carolina Department of Education, *Rankings of the Counties and School Districts of South Carolina, 1986-87,* Columbia, South Carolina, 1988; and data provided by the Office of Dependents Support Policy, U.S. Department of Defense.

[a] Child development center.

[b] Calculated on the basis of current operating expenditures per pupil. The LEA operating budget does not include debt retirement, the cost of buses and textbooks, or the state's contribution toward the employees' retirement system.

These data suggest that the Richland Two faculty already has had experience dealing with the transient military dependent population and that Richland Two is large enough to have the administrative capacity to absorb the Fort Jackson Section 6 schools.

Two actions probably will increase the size of the base school population in the future. First, an additional 120 housing units are being constructed on the base. This housing is designated for grades E-4 or lower, so it is unlikely that many school-age children will be living there, although there may be some increase in the kindergarten and first-grade enrollment. Second, one recommendation of the Defense Secretary's Commission on Base Realignment and Closure is to assign to Fort Jackson some responsibilities currently assigned to other bases. As a result, the number of military serving at the base will increase by 661. Whether this increase will also affect the Section 6 school enrollment will depend on the extent to which the reassigned military are accommodated with on-base housing.

Interaction Between School Systems. Relations between the Section 6 and LEA systems appear very cordial. The base schools coordinate their curricula with Richland Two in order to smooth students' transition from sixth grade at the base elementary school to seventh grade at the LEA middle school. This is especially important because Richland Two seventh graders have already spent a year in the middle school.

In response to the possibility of a transfer, the LEA has initiated the formation of a committee to survey the issues and factors involved and to facilitate a transfer, should it occur. Base and Section 6 school representatives will make up part of the committee. The LEA superintendent would prefer to negotiate a transfer agreement allowing a two-year transition period to set up the actual transfer of the base schools to local control.

Facilities. The Fort Jackson school facilities comfortably accommodate the current base school population. Of the three facilities, two were built with Department of Education funds and one with DoD military construction funds. School officials note that two schools are being used at capacity, while the third school is not. Several circumstances could change this situation in the future. First, the base schools have started a program for four-year olds. As it expands, more classroom space will be required. Second, the current construction of on-base housing could increase the enrollment in the early grades. Finally, the possible increase of military assigned to the base as a result of the proposed national realignment of base missions could result in a substantial increase in the base school population.

Although the base facilities are adequate for the student population, they require a number of improvements. Two schools need remodeling, to update and to add space for special activity areas, such as reading and art. In addition, school officials have requested funds for the construction of a storage facility. These as yet unfunded construction needs will cost $1.375 million.

In contrast to the base, the LEA facilities have been overcrowded, forcing the school district to use over 100 portable classrooms. Richland Two's school enrollment grew by about 1,500 from September 1985 to September 1988. School officials believe that this growth will continue if the local economy continues to grow. The school district already has in place a ten-year building program to meet current and future growth needs. Voters, in an October 1987 referendum, approved funding for the the first five years of the program by a two-to-one margin. There will be a second referendum in 1991 to raise funds for the second half of the building program. Richland Two intends to add a high school, a middle school, and two elementary schools.

Section 6 School Ownership and Access. Because Richland Two facilities could not accommodate the Section 6 students, LEA officials stress that they would need the use of the three base schools in the event of a transfer. These officials would find a transfer of ownership or a long-term lease arrangement acceptable. Base officials would prefer the latter. In addition, the LEA superintendent would want a clause in the transfer agreement making it the responsibility of the federal government to fund any needed building additions, should the base school population increase in the future.

In general, access does not appear to be an impediment to LEA use of the base schools. Fort Jackson is an open base and Richland Two buses already come onto the base to transport secondary school students to LEA schools. There have been no problems with this arrangement. As in the case of all of the Section 6 school sites, base officials have some concerns about maintaining control of the post. For example, they worry about discipline problems spilling over from the school onto the base. Both base and LEA officials would want a clear delineation of jurisdiction, as well as assignment of responsibilities (maintenance of grounds, utilities, police and fire service, etc.) as part of the transfer agreement.

LEA Financing. Under South Carolina's equalization approach to state funding of education, Richland Two has become increasingly dependent on locally generated revenues. In SY 1986-1987, the district's budget was based on $32,508,759 in revenues, of which 57 percent came from the state and 43 percent from local sources. In the district's 1988-1989 budget of $36 million, local revenues account for over one-half of the budget. This reflects the State Department of Education's determination that the index of tax paying ability in Richland County School District Two increased during the intervening years, thereby resulting in a decrease in EFA state funding.[2] Federal funding, in the form of Impact Aid, accounts for less than one percent of the budget.

Local revenue is derived primarily from property taxes. Richland Two, as a school district, cannot levy its own taxes. Rather, the school board draws up the budget and submits it to the County Council for approval. The County Council can raise taxes, but must have a referendum if the increase is 8 percent or more of assessed value. The assessed value in Richland County School District Two is approximately $141.8 million, on which 128 mills are levied for school purposes.[3]

Local financing of the the base school students, should a transfer occur, is a major concern of LEA officials. Local revenues account for about $1,467 per student. Richland Two is classified as a Regular A district in terms of federal Impact Aid; the addition of the Fort Jackson Section 6 students would not affect that status. As a Regular A district, Richland Two has been receiving about $565 per base secondary school student. In terms of Richland Two's local contribution, this represents a shortfall of about $900. Based on current Impact Aid payments and local per-pupil revenues, school officials estimate that a transfer of the Fort Jackson Section 6 students could leave the district with a shortfall of some $1.2 million. Richland Two taxpayers would have to pay an extra 9 mills per year (about $36 for the owner of a $100,000 home) to cover the deficit. An alternative would be to ask the County Council to pay for the Fort Jackson students from a countywide assessment of only about 2 mills. School officials suggest the county approach, because the county benefits financially from Fort Jackson. Thus, the entire county should share in these education costs. School officials fear that either approach to financing the base students could precipitate taxpayer disgruntlement which could negatively affect community-base relations.

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[2] EFA is the Education Finance Act, which provides the bulk of the state's funding to the local school districts

[3] Assessments of fair market value vary according to ownership and land use. Legal residences of five acres or less are assessed at 4 percent of the fair market value.

School Board Vote and Representation. The Richland Two school board consists of seven members, elected at-large for four-year terms. Because most parents of Fort Jackson students are not South Carolina residents, they would not be able to vote. Those that could vote would not have the electoral clout to influence an at-large election. However, the school board would probably be amenable to adding a non-voting member to represent Fort Jackson. LEA officials suggest that such an ex-officio member could be elected by the base parents.

Other options exist for parental input into their children's education. For example, each school in the district has a School Improvement Council, composed of parents, teachers, and, in some cases, students. The Council meets periodically with the principal and school staff, helps prepare the annual school report, and provides assistance to the principal, as requested. If the council deems it necessary, it can file a separate school report to the district school board.

School Assignment. A transfer of the Fort Jackson schools to Richland Two could result in some changes in school assignment. In general, LEA officials stressed that it would be their intent that children who go to the Fort Jackson schools would continue to attend those neighborhood schools. However, because Richland Two uses the middle school approach, the LEA may reorganize the base schools into kindergarten through fifth grade elementary schools, reassigning base sixth-grade students to Richland Two middle schools.

Because reassigning the sixth graders could create unused classroom space in the base facilities, LEA officials stated that they might want to use that space for students living off the base. The most likely approach would be to house special programs in the base schools, rather than adding LEA students to base kindergarten through fifth-grade classes. However, base officials are wary of assigning off-base students because they perceive loss of control should school discipline problems spill over onto the base. Currently, base officials can indirectly address such problems through a student's parents, because the base commander can hold the military accountable for their dependents and can determine whether a family continues to live on base. Once children of civilians off the post begin attending base schools, base officials lose that control.

Finally, LEA officials stated they would not reassign base children to non-base schools for racial balance. Richland Two is not under federal court order for desegregation. The base schools do have a higher proportion of minorities than the LEA. Minorities compose about 39 percent of the Richland Two enrollment, as compared to 66 percent of the Fort Jackson enrollment.[4] However, barring a court suit filed on this issue, LEA officials would support the continuation of neighborhood elementary schools for base students.

Employee Status. The Fort Jackson staff consists of five administrators, 72 teachers and professional staff, 26 teacher aides, 8 general schedule employees (office staff), and 19 wage-grade employees (custodial and cafeteria staff). These Section 6 employees, all under annual contracts, raised a number of concerns about the effects of a transfer on their employment status. The following address the major issues, particularly for the teachers.

Job Security. The foremost concern of Section 6 employees is their continued employment. Senior employees are particularly concerned that the LEA might give preference to hiring less-experienced applicants because they earn lower salaries. However, the Richland Two superintendent stated the LEA's policy would be to offer jobs to all the Section 6 staff, regardless of years of experience. The only exception would be those whose annual contract had not been renewed by the Section 6 superintendent due to unsatisfactory performance. Moreover, because the transfer would be a unique situation, LEA officials would waive the district's rule against hiring those with relatives already working in the school district. LEA officials stressed that they would try to make any transfer of employment as untraumatic as possible. Most teachers would have the same assignments, although some of the support staff probably would be reassigned to other schools. Experienced Section 6 teachers would not be supervised as beginning teachers, although state-mandated performance reviews would be performed.

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[4] The Richland School District Two enrollment is 61 percent white, 34 percent black, and 5 percent other. The Fort Jackson enrollment is 34 percent white, 48 percent black, and 18 percent other.

Years of Experience. State rather than local school authorities determine years of experience, based on each teacher's state certificate. Because the Fort Jackson teachers have state certificates, they should receive credit for their years of employment in the dependents schools.

Salary. LEA officials stated that all Section 6 employees would be paid according to LEA salary schedules. For most Section 6 employees, this would mean a decrease in salary. Table 17 provides examples of the differences between the base and LEA salary schedules for teachers. It appears that the higher the degree, the greater the disparity in salaries. Sixty-three percent of the Fort Jackson teachers have a Masters degree; 7 percent have a Ph.D.

Other factors contribute to the comparability of the two salary schedules. LEA officials point out that their teachers are paid for fewer work days than those at the base schools. In addition, unlike the Fort Jackson staff, Richland Two teachers can collect salary supplements ranging from $100 to $1,000 for acting as a sponsor, advisor, or coach of an extracurricular activity, although these positions exist primarily in the secondary schools. In the elementary schools, department leaders receive a salary supplement of $200. Salary differences may be more significant for the support staff.

Table 17

DIFFERENCES BETWEEN THE FORT JACKSON AND
RICHLAND SCHOOL DISTRICT TWO SALARY SCHEDULES
(1988-1989)

Years of Experience	Fort Jackson Teachers' Salaries ($)	Richland Two Comparison ($)
Bachelors degree		
0 Years	$18,907	-$ 474
8 Years	22,694	- 730
15 Years	25,303	- 643
Masters degree		
0 Years	22,134	- 1,059
8 Years	26,562	- 975
15 Years	30,435	- 969
Doctorate		
0 Years	26,140	- 2,130
8 Years	32,451	- 2,137
15 Years	37,945	- 2,491

Benefits. LEA employees have access to several health benefits. Richland Two employees participate in the health insurance program provided by the State of South Carolina. Employees choose between a Blue Cross/Blue Shield plan or one of the approved Health Maintenance Organization (HMO) plans. In addition, all employees are covered by the state dental insurance plan and a Worker's Compensation plan.

Under state guidelines, newly hired teachers can transfer up to 90 days of sick leave. Moreover, unlike the base schools, Richland Two employees can cash out any sick leave accrued in excess of 90 days at the rate of $35 per day. Employees may also cash out their sick leave upon retirement.

Both the state and the LEA provide life insurance benefits at no cost to employees. The state health plan includes life insurance coverage of $3,000. In addition, Richland Two provides all full-time employees with a minimum of $40,000 life insurance. Regular part-time employees receive life insurance at a rate twice their annual salary. Each employee is covered with liability insurance.

LEA employees are also enrolled in the retirement program operated by the State Retirement Systems. Employees contribute four percent on the first $4,800 of earnings and six percent on all earnings over that amount. Provisions exist by which individuals with federal employment can buy in credit for those years. However, such a buy-in is extremely costly--10 percent of current salary for each year purchased. The federal and state governments might arrange for a less costly group buy-in option as part of the transfer of the Section 6 schools. This is a federal and state, and not an LEA, decision.

LEA officials argued that the added value of the benefits offered employees helps close the differences in salary schedules offered by the base and Richland Two. For example, an LEA teacher with 16 years of experience and a Masters degree earns $29,937 salary. But the total value of the added benefits--state and LEA contributions toward social security, retirement, health insurance, worker's compensation and liability insurance--is an additional $5,849.

Finally, the LEA provides employees required to hold South Carolina professional teaching credentials with tuition reimbursement. State teaching certificates are valid for only five years and cannot be renewed without an additional six hours of course credits. Richland Two will reimburse such employees every two years for the successful completion of a three-hour credit course in the employee's field of specialization.

OTHER CONCERNS OF PARTIES INVOLVED

Quality of Education. All parties agree that Richland School District Two has an excellent reputation. A number of accomplishments can be cited that give credence to this perception. In 1986-1987, for example, Richland Two ranked 22 out of 91 South Carolina school districts in per-pupil expenditures. Seven of the district's schools have been selected as "model schools" by the U.S. Department of Education; of the two elementary schools receiving the Department's Excellence in Education award in 1987, one serves many of the military dependents living off the post. In the spring 1988 administration of the Comprehensive Test of Basic Skills (CTBS), 71 to 80 percent of each grade taking the test scored above the national 50th percentile. Seventy-two percent of the 853 students graduating in 1988 planned to go on to post-secondary school education; these graduates were awarded over $750,000 in scholarships.

Base school administrators, faculty, and parents believe that a transfer, even to an LEA with an excellent reputation, would result in a decline in the quality of education offered base students. They argue that the Section 6 schools on the base are better able to tailor educational programs and services to the needs of a transient student population, and they cite a number of examples.

Base faculty argue that in the Fort Jackson schools, new transfers are more readily processed, tested, and placed than in the LEA schools. Referrals, which can take up to months in the LEA, take only two weeks at the Fort Jackson schools. Generally, the base schools use more testing and diagnostic approaches to placement than the LEA schools. Moreover, midyear transfer students often cannot get into LEA programs because the slots are already filled. The base faculty emphasize a more individualized approach, gearing course work to each student's level of achievement. Finally, the base schools ease students' future transience by maintaining easily transferred files and administering nationally normed tests in addition to the South Carolina testing program.

Base school administrators can be more flexible than the LEA in the application of state rules and guidelines. Special area teachers argue that this is particularly important because the South Carolina curriculum is strongly linked to testing. For example, under state guidelines, the LEA can give remedial attention to any student scoring below the 25th percentile in basic skills assessment. Base schools can be more flexible, targeting borderline students for additional help. The base schools have been able to adapt their pilot program for four-year olds to include a greater percentage of the population-at-risk.

Base faculty feel that another factor that creates differences between the Fort Jackson and Richland Two schools is the nature of the population they each serve. The base school population is more heterogeneous, and generally on a lower socioeconomic scale than the LEA. For example, approximately 5 to 15 percent of the base school enrollment is ESL (English as a Second Language), a trend which is on the increase. About 70 percent of the base speech therapists' case load is language related, as compared to only 15 percent in Richland Two.

Finally, base faculty argue that the Fort Jackson schools are more attuned to the unique pressures and circumstances of military life. Teachers are sensitive to the problems children have moving into a new community and school system. They assume the student has lost school time in a midyear transfer, and help that student catch up. School administrators and parents feel that some of the trauma associated with moving is alleviated by attending a school in which fellow students have had similar experiences. The schools sponsor a club for children whose parents are serving tours in Korea. In addition, the base schools help provide needed stability and services through their close ties with other base community organizations and activities, such as referrals to Family Services. Children attending the base schools can tie into the base latchkey program, while handicapped students can take advantage of base hospital services. In fact, the Army has identified Fort Jackson as a post for military whose dependents need special services.

The Richland Two superintendent is aware that the needs of the base student population may not be identical to those of the general LEA population. If a transfer took place, the superintendent would support a program to educate the school board and electorate concerning those needs, including the possible assignment of additional resource personnel to the base schools.

DECISION SUMMARY

A number of factors influence the readiness of the Fort Jackson dependents schools to be transferred to Richland School District Two. The following identify the issues which facilitate and impede such a transfer.

Factors which facilitate a transfer:

- Richland School District Two appears to have jurisdiction, even though Fort Jackson has been incorporated within the Columbia city limits. Richland Two educated the base elementary students before the creation of the post Section 6 school and has always educated the base secondary school students.
- In addition to the base secondary school students, Richland Two already educates some 1,000 military dependents living off the post.
- Richland Two is a large enough school district to absorb the entire base student population, which would make up about ten percent of the school district's enrollment.
- Fort Jackson is an open post, making access easier. Richland Two school buses already have access to transport base middle school and high school students.
- In the event of a transfer, Richland Two could use the base facilities under an arrangement such as a long-term lease.
- The LEA would maintain the base facilities as neighborhood schools--base students would continue to attend them. Richland Two is under no court order governing school assignment.

- The Richland Two school board would add an ex-officio position for a representative of the base parents' concerns.
- The LEA has an excellent academic reputation.

Factors which impede a transfer:

- The LEA facilities do not have the class space to accommodate the base elementary students.
- The three Fort Jackson facilities have unfunded construction needs in excess of $1.3 million.
- The proposed reorganization of U.S. military bases could result in a significant increase in the Fort Jackson student enrollment.
- Under current Impact Aid guidelines, the LEA would not recover the local per-pupil expenditure of educating base students. The shortfall would be over $900 per pupil.
- Because the LEA uses a middle school approach, base sixth graders probably would be reassigned to LEA middle schools.
- The LEA may want to assign students living off the post to the Fort Jackson schools.
- Base parents do not want to give up the influence they have over their children's education through electing and running their own school board.
- Base faculty and parents perceive that their Section 6 schools are better able to meet the needs of military dependents.

OPTIONS TO CONSIDER

The circumstances surrounding most Section 6 schools do not exist at Fort Jackson. The post is located in a metropolitan rather than a rural area. The LEA has an excellent academic reputation. There is no evidence of racial discrimination in the LEA. Given these circumstances, the Fort Jackson schools are more ready to be considered for transfer than most Section 6 schools.

1. **No Transfer.** The status quo could be maintained. Both the base and the LEA are satisfied with the current arrangement. Base parents feel that their children benefit from a school system geared to the needs of the military child.
2. **Transfer with an Assisted Option.** Most of the impediments to a transfer could be addressed through negotiations. From the LEA's viewpoint, the two greatest drawbacks to a transfer are the financing and facilities. Impact Aid does not adequately compensate the local contribution toward per-pupil expenditures and the LEA does not have the classroom/space to house the base elementary students. The assisted option would reimburse the LEA for its local contributions. Transfer negotiations could include arrangements, such as a long-term lease, for the LEA's use of the base school facilities. In addition, the LEA might want to include some guarantee that the federal government would expand the base facilities to accommodate any future significant increases in the base population.

Concerns of the Fort Jackson base commander, school employees, and parents also might be addressed in the negotiations. For example, LEA agreement to maintain the base facilities as neighborhood schools and hire the existing school staff would preserve some of the perceived advantages of the Section 6 schools. The provision of an ex-officio position on the Richland Two school board would give base parents a highly visible channel of communication with the LEA administration. Base and LEA officials would also have to assign responsibilities for maintenance, police, fire, and other services, as well as come to an understanding on the assignment of non-base residents to the base school facilities.

XIV. LAUREL BAY, SOUTH CAROLINA

BACKGROUND: LAUREL BAY

Four military installations are located in or near Beaufort, South Carolina: the Laurel Bay military housing area, operated by the Marine Corps Air Station; the Marine Corps Air Station (MCAS) Beaufort; the Marine Corps Recruit Depot (MCRD) on Parris Island, and the Beaufort Naval Hospital. The Section 6 schools, which serve the military dependents living at all four installations, are located at Laurel Bay. The Air Station is the operating base for the Fleet Marine Force units, including six squadrons of the Air Marine Group-31. Other units located at MCAS Beaufort include the Marine Air Control Squadron and a detachment of Marine Wing Support Group-27. The Parris Island MCRD is a major recruit training installation for the Marine Corps. Tenant units include the Naval Investigative Service, U.S. Customs, and the Naval Security Group. Approximately 6,076 Marines and Navy personnel are stationed at these three installations--58 percent at the Air Station and 35 percent on Parris Island.

Laurel Bay is a separate self-contained housing area with 1,100 family units, which is the majority of the area on-base housing. In addition, the three military installations have smaller housing areas. Although the Section 6 schools are located in Laurel Bay, they also serve students living on the other three military posts.

Geography and Economy. Four military installations are located in and around the city of Beaufort. The distance of each military installation from Laurel Bay varies from approximately three to ten miles. The total acreage of the three military installations and Laurel Bay is 14,709 acres, less than 4 percent of the county land.

These military installations are important contributers to the area economy. Annual expenditures of all three total about $136 million. The three employ about 1,500 civilians. Moreover, 38 percent of military assigned to the area live off the post, as do about half of the 8,688 military dependents.

History of the Section 6 School. A school for military dependents living at Laurel Bay dates back to 1958, when the housing area was created for the military assigned to MCAS Beaufort. At that time, federal funds were used to construct an elementary school in Laurel Bay. This school for dependents living in the housing area was operated by the Beaufort County School District. Three years later, it was converted to a Section 6 school because of segregation in the LEA. The ownership of the building and surrounding land was turned over to the U.S. Department of Health, Education and Welfare and the school operation funded through the Section 6 program.

Although the Laurel Bay Section 6 School originally served only those connected with the Air Station, elementary students from Parris Island and the Naval Hospital also began attending the Laurel Bay schools in 1973. In the case of Parris Island, this represented a consolidation. Up until then, the MCRD at Parris Island had its own school for dependents living on the installation.

Currently, the Laurel Bay Section 6 School system educates about 1,100 students in kindergarten through the sixth grade. About 80 percent of the students live in Laurel Bay and walk to class. The remaining 20 percent are bused from housing areas on the three military installations.

The school system has two facilities. Laurel Bay Primary, the original school built in 1958, serves kindergarten through the 2nd grade. Laurel Bay Intermediate, completed in 1963, includes grades three through six.

BACKGROUND: BEAUFORT COUNTY

Geography and Economy. Beaufort County encompasses the southernmost coastline and islands of South Carolina. The county seat of Beaufort is only 45 miles from Savannah, Georgia. The county covers 588 square miles, including Hilton Head and other seashore resorts, such as Point South and the Huntington Island State Park. The development of these resorts has contributed to a population growth rate which is among the highest in the state. The county's estimated 1986 population of 88,000 represented a 35 percent increase over the 1980 census.

In addition to the tourism and military bases, the major contributors to the local economy are light industry, farming, fishing, and the retail trade. The University of South Carolina has a regional campus at Beaufort and the Beaufort Technical College offers course work in technical and vocational training.

Beaufort County School District. The county school system serves preschool through grade twelve in 19 facilities. The 1988 county enrollment of 11,652 includes about 350 secondary and handicapped military dependents living in Laurel Bay or the three military installations.

FACTORS INFLUENCING TRANSFER

A number of issues affect the potential transfer of the Laurel Bay schools to the county school system. Table 18 compares selected characteristics of the two systems, while the following address some of the factors which influence a transfer.

School Population. The Beaufort school population is relatively large compared to Laurel Bay. If a transfer occurred, Laurel Bay students would make up 8.7 percent of the LEA enrollment. However, this statistic would understate the actual number of base students in the Beaufort school system because secondary and handicapped students living on these military installations already attend the LEA. Thus, if the Laurel Bay schools were transferred, Beaufort County would be educating about 1,500 base students, representing about 11.5 percent of the LEA enrollment.

In addition to the base secondary students, the Beaufort school district educates most of the military dependents living off the base in local communities. About 835 students, or 7.5 percent of the current LEA enrollment, fall into this category. If the Laurel Bay schools were transferred, and all the military dependents living both on and off military installations were counted, military dependents would make up about 18 percent of the LEA enrollment.

Table 18

LAUREL BAY AND BEAUFORT COUNTY SCHOOL DISTRICTS

Item	Laurel Bay		Beaufort County
Enrollment (1988)	1,116		11,652
(Ratio Laurel Bay to LEA)		(1:10)	
Grade span	K-6		K-12
Number of schools	2		19
Elementary	2		12
Middle/Junior High School	-		3
High School	-		3
Special	-		1[a]
PPE (SY 1986-1987)[b]	$3,327		$3,256
Pupil/teacher ratio	15.5		18

SOURCE: South Carolina Department of Education, *Ranking of the Counties and School Districts of South Carolina, 1986-87,* Columbia, South Carolina, 1988; and data provided by the Office of Dependents Support Policy, U.S. Department of Defense.

[a] School for exceptional children.

[b] Calculated on the basis of current operating expenditures per pupil. The LEA operating budget does not include debt retirement, the cost of buses and text books, or the state's contribution toward the employees' retirement system.

These data indicate that Beaufort County administrators and faculty already have experience with military dependents attending their schools. It would also appear that this LEA is large enough to absorb the Laurel Bay students should a transfer take place.

Interactions between the Two Systems. The Laurel Bay and Beaufort County school systems cooperate in trying to make the graduation of sixth graders and handicapped students to the LEA as smooth as possible. The LEA sends guidance counselors from the junior high to talk with Laurel Bay sixth graders, who also visit their new school. Laurel Bay faculty coordinate curricula and administer state-mandated tests. Laurel Bay faculty try to mainstream special education students prior to graduation.

Several channels of communication exist between the LEA and the military. Each of the three military facilities in the area has assigned a liaison to the Beaufort County school district. These liaisons are furnished with the agenda and minutes of all county school board meetings, and can assist with any problems concerning the base secondary school students who attend LEA schools. In addition, the Laurel Bay and Beaufort County school boards meet together twice a year to discuss mutual concerns.

Facilities. The two Laurel Bay schools, both owned by the U.S. Department of Education, have adequate space for the current kindergarten through sixth grade enrollment. Additions to base housing could add to the school population. For example, sometime in the future, the commanding officer of the Air Station would like to build another 200 units in Laurel Bay for E-1 through E-3 personnel. If this were approved, enrollment in the early grades could increase.

Although the Laurel Bay facilities accommodate the elementary school population, lack of additional space has hampered the initiation of the state-mandated program for four-year olds. Laurel Bay's unfunded construction needs include the addition of an administrative/classroom unit, as well as a multi-purpose unit for physical education and music, at a total cost of $1.8 million. In addition, Laurel Bay is in the midst of a five-year maintenance plan for FY 1987-FY 1991, at a cost of $723,000. The latter covers a number of needed renovations.

In contrast to the base school facilities, the LEA schools are overcrowded. About one-quarter of the county's students are housed in mobile units. The county enrollment has been growing by 4 to 6 percent annually. From 1981-1988, the increase was 2,800 students, with the largest number being added to the earliest grades. In 1988, voters passed a referendum to raise $45 million toward a five-year building plan to "catch up" on facility needs. However, the growth in enrollment is likely to continue into the future. As a result, the district has established a committee to make annual reports on population trends along with recommendations regarding facilities' needs.

School Ownership and Access. Because LEA facilities are overcrowded, Beaufort County school officials stated that they would need the use of the two Laurel Bay facilities, or their equivalent, in the event of a transfer. However, negotiating LEA use of the Section 6 schools could be influenced by several factors. First, even though Laurel Bay is only a housing area with no military function, it is administered as a closed, secure area. The perimeter is fenced and guards check non-residential traffic entering the gate. LEA buses do enter Laurel Bay to transport secondary students to Beaufort schools; both LEA and base officials report there have been no problems arising from this arrangement. The Air Station commanding officer, however, is uncomfortable with the prospect of more non-residents entering Laurel Bay if the LEA operates the Laurel Bay schools. He envisions a loss of control when students, parents, and supervisors from outside the housing area attend school functions at Laurel Bay schools.

A second factor concerns the location of the two Laurel Bay school facilities. The Laurel Bay Primary School is located by the perimeter of the housing area. It would be possible to move the perimeter fence so that the building and adjacent grounds would then be outside the secured housing area. This would not only alleviate the concern of base officials about access, but would also facilitate transferring ownership of the school to the LEA.

The location of the Laurel Bay Intermediate School is not as fortuitous. Although situated on the edge of base housing, it is adjacent to more federally owned land. Moreover, base officials can envision no practical way to separate the school from the secured area, such as moving the perimeter and establishing a separate access corridor. Because the facility would have to remain inside the closed area, the Air Station commanding officer is wary about possible LEA use and ownership of the school. Transfer of title is not the only arrangement by which the LEA could use the facility. A long-term lease might be an alternative approach; for example, the Air Station already rents a building to the credit union.

LEA Financing. Under South Carolina's equalization approach to state funding of education, Beaufort County depends primarily on locally generated funds to operate the county school system. In SY 1986-87, revenues from all sources totaled $42,102,169, with 73 percent coming from local sources. The following year's budgeted revenues increased to $45,921,150, with local funds accounting for 77 percent of the budget. The federal share of revenues has remained low, ranging from 6 to 8 percent during the two school years. Federal Impact Aid has been decreasing, representing only a fraction of one percent of total revenues, and budgeted at only $165,000 in SY 1987-88.

Local revenue is derived primarily from property taxes, which are levied by the County Council rather than the school board. Local officials indicated that the State Department of Education's calculations indexing Beaufort County's tax paying ability are influenced by the market values ascribed to the resort areas such as Hilton Head. In SY 1986-87, Beaufort's local taxes for the school district's current operations were $1,991 per pupil, ranking the county as second highest among the state's 91 school districts.

Because the local contribution is relatively high, federal Impact Aid payments do not adequately recompense Beaufort County for the local per-pupil contribution toward base children's education. The LEA already receives Impact Aid for educating the secondary students living on military installations. Beaufort County is classified as a Regular A district, qualifying for the lowest payments in that Impact Aid category. The addition of the Laurel Bay Section 6 students would not affect that status. During FY 1988, Regular A payment averaged about $565 per pupil, which was about $1,400 less than Beaufort's local contribution. If a transfer occurred, LEA officials estimate that the county council would have to make up the shortfall by increasing the current millage levied for education by as much as 10 percent.[1] The average homeowner's property taxes would increase by about $24.

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[1] In FY 1989, the County Council earmarked 78.7 mills for education. LEA officials estimate that adding the Section 6 students would require an additional 6 to 8 mills, just to meet the current per pupil contributions. This may not cover future increases in the local contribution.

School Board Vote and Representation. The Beaufort County School Board is composed of nine members serving four-year terms. Three are elected at-large, while the remainder are elected from geographic districts. Military housing areas are included in existing districts. Base residents who are also Beaufort County residents may vote in the board elections. However, it is doubtful that enough of the military parents would have claimed local residence to have much of an impact on school board elections.

LEA officials had not, as yet, considered the issue of providing base parents with some form of representation on the school board. The superintendent doubted that the board would create an ex-officio position for a base representative. However, LEA officials pointed out that other channels of communication exist. Each LEA school has a School Improvement Council, on which parents can serve. And the school district sometimes appoints a base representative to LEA committees, such as the one formed to track the facilities requirements of the school district.

School Assignment. A major concern on the part of base parents and the Air Station's commanding officer is how a transfer would affect school assignments. Because some students at the Laurel Bay schools are bused from other locations, parents living at Parris Island and the Naval Hospital fear their children would be reassigned to LEA schools geographically closer to those installations. Beaufort County school officials confirmed that they would probably reassign Laurel Bay students to the closest LEA school. Thus, students living in Laurel Bay housing would continue to attend the Laurel Bay schools, but the others would attend different schools. Moreover, county school officials indicated that they would assign neighboring LEA students to fill the classroom space made available by the reassignment of about 20 percent of the current Laurel Bay enrollment. The commanding officer expressed reservations about having outside LEA students attend a school located within the closed, secure perimeter of Laurel Bay. He noted that this would increase outside traffic because not only students but their parents and others participating in school functions would need to come into Laurel Bay.

Base parents were uncertain as to whether Laurel Bay students would have to be bused to other LEA schools as a means of maintaining an established racial balance. Minorities make up almost one-third of the Laurel Bay enrollment as compared to a little over one-half of the LEA student body. County school officials indicated that they try to maintain neighborhood schools. Thus, although the county tries to keep a similar racial mix throughout the school system, geographic considerations promote some fluctuation among individual schools. Beaufort County is monitored by the Office of Civil Rights (OCR) and any rezoning of school assignments is submitted to the OCR. Thus, if a transfer took place, school assignments would be reviewed. However, LEA officials foresee no reason why the school assignments discussed above would not be accepted. In all likelihood a transfer would mean that Laurel Bay residents would continue to walk to the same schools they attend now. Parris Island and Naval Hospital residents would continue to be bused, only to closer LEA schools.

Employee Status. The Laurel Bay Section 6 School employs a staff of 119, including 3 administrators, 72 teachers, 21 teacher aides, and 23 support staff. Discussion of a possible transfer raises a number of uncertainties concerning the future status of these employees. The following address some of the major concerns raised, especially by the Laurel Bay teachers.

Job Security. The foremost concern of Section 6 employees is their continued employment. However, LEA officials indicated that the LEA could absorb all of the Laurel Bay teachers because the county hires about 100 new teachers each year, including 60 for the elementary school level. The school superintendent indicated that the LEA policy would be to hire all of the Laurel Bay teachers the first year of the transfer, but subsequent employment would depend on performance evaluations during that period. Support and custodial personnel would also probably be employed after the transfer.

Years of Experience. State, rather than local, school authorities determine years of experience, based on each teacher's state certificate. Since Laurel Bay teachers have South Carolina certificates, they should receive credit for their years of employment in the dependents schools. Laurel Bay teachers also expressed the concern that changing employers would mean that they would be treated as beginning teachers, even if they had considerable experience. LEA officials explained that their contracts would be the same as other teachers hired by the district, i.e., provisional during the first year of employment and continuing after three years of employment. Beaufort would follow the state guidelines for teacher evaluations, as well as the Beaufort School Board mandate of annual evaluations.

Salary. Laurel Bay teachers worried that working for the LEA would involve substantial cuts in salary. As Table 19 illustrates, substantial differences exist between the two salary schedules in all but the lowest education category. In most of the examples, Laurel Bay teachers would earn at least $3,000 less if they were employed by Beaufort County. However, LEA officials suggested several factors which ameliorate the differences in teachers' salaries. First, the Beaufort County contract covers only 190 days, 15 days less than at Laurel Bay. The LEA work day is one-half hour shorter. In addition, the LEA has an Individual and Building Merit Pay Plan. Under this program, individuals can earn an additional $2,000 to $3,000.

School Assignment. LEA officials identified several factors which could alter the current assignments of the Laurel Bay teaching staff. First, the county might have to reassign some Laurel Bay teachers to comply with agreements on the racial mix of elementary school faculties. Under a 1970 agreement with the U.S. Department of Health, Education and Welfare (HEW), the county agreed to maintain elementary school faculties that were 25 to 30 percent minority, give or take 10 percent. Because the Laurel Bay faculty is only 11 percent minority, some reassignment would be necessary to achieve the goal of the agreement. In addition, the LEA makes greater use of itinerant teachers than Laurel Bay, so some resource personnel at Laurel Bay may be given multi-school assignments.

Employee Benefits. Medical benefits offered by the LEA include a Blue Cross/Blue Shield group hospital, as well as a major medical and dental plan with provisions for life insurance and disability insurance.

Table 19

DIFFERENCES BETWEEN THE LAUREL BAY AND BEAUFORT COUNTY SALARY SCHEDULES (1988-1989)

Years of Experience	Laurel Bay Teachers' Salaries ($)	Beaufort County Comparison ($)
Bachelors degree		
0 years	$21,470	-$3,093
8 years	24,175[a]	- 1,846
15 years	24,175[a]	+ 1,682
Masters degree		
0 years	24,360	- 3,318
8 years	28,526	- 3,073
15 years	32,776	- 3,463
Doctorate		
0 years	27,619	- 4,523
8 years	32,356	- 3,765
15 years	37,178	- 3,778

[a] The Laurel Bay salary schedule for teachers with Bachelors degrees, and less than 18 additional hours, stops after six years of experience.

In addition, Laurel Bay teachers hired by Beaufort could transfer up to 90 days of accumulated sick leave. LEA employees are also eligible to participate in tax-sheltered annuity plans in which employee contributions are payroll deductible, to join the Marine Corps Air Station Federal Credit Union, and to take sabbatical leave after seven years of service in the school district. Finally, LEA employees participate in the State Retirement Plan, with eligibility at age 60 or 30 years of service. Although individuals with federal employment can buy in credit for those years, it is extremely costly--10 percent of current salary for each year purchased. The federal and state governments might arrange for a less costly group buy-in option as part of the transfer agreement. However, this is a federal and state, not an LEA, decision.

OTHER CONCERNS OF PARTIES INVOLVED

Quality of Education. Base leaders, parents, and faculty argue that transfer to the LEA would result in a decline in the quality of education offered base students because the Section 6 school is better able to tailor educational programs and services to the needs of a transient student population with a one-third annual turnover rate. Base faculty and administrators provided several examples. Laurel Bay is set up to evaluate and test for special problems in about half the time it takes the LEA. Moreover, Laurel Bay is atoned to addressing special needs. Special education classes are smaller than state guidelines require. Laurel Bay schools have full-time resource personnel in speech therapy and counseling, which are itinerant positions in the LEA. Finally, the Section 6 faculty is sensitive to the distress students may be feeling because a parent is temporarily stationed abroad or serves in a high-risk occupation. The Laurel Bay schools sponsor a number of clubs, such as the newcomers club and the overseas support group, to provide children with help in dealing with such stress. In addition, the school sponsors a parents group to help students whose parents are away on overseas assignments. The school also has tie-ins with the base hospital and family services programs.

Parents and faculty also argue that the quality of education would decline because the Laurel Bay program is more resource-rich than that of Beaufort County. Base teachers perceive that the Laurel Bay schools are better stocked with textbooks and other materials. In particular, the Laurel Bay schools have outstanding audio-visual aids equipment and enough computers to stress computer learning. For example, the base school offers a math computer course not offered in the LEA. Parents and classroom teachers also note that the Laurel Bay staff includes more resource personnel who are assigned full time to a single school. This contrasts with the LEA in which music, art, and physical education teachers are itinerant positions, i.e., they have responsibility for

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more than one school. Laurel Bay also has a greater proportion of permanent teacher-aide positions than does Beaufort County.

Finally, a number of base parents expressed misgivings about discipline in the LEA. The perception of such problems apparently dates back some time. The current situation is much improved and, in fact, no one we talked with had first-hand experience with any major discipline problems in the LEA. Administrators from both the base and LEA school systems suggested that perceptions had not yet caught up with reality. However, parents of base students from Parris Island and the Naval Hospital expressed concern that, in the event of a transfer, their children probably would be reassigned to closer LEA schools.

DECISION SUMMARY

A number of factors influence the readiness of the Laurel Bay dependents schools to be transferred to Beaufort County. The following identify the issues which facilitate and impede such a transfer.

Factors which facilitate a transfer:

- Beaufort County has clear jurisdiction and has always educated the secondary school students living on area military facilities.
- In addition to the base secondary students, Beaufort County educates over 800 military dependents living outside area installations.
- Beaufort County is a large enough school district to absorb the entire base school population, which would make up about 11.5 percent of the LEA enrollment.
- Beaufort County has a healthy tax base due to the development of resorts in the area.
- Beaufort County already has access to Laurel Bay and neighboring military installations in order to transport secondary school students to LEA schools.

- One of the Laurel Bay schools could be separated easily from the closed housing installation by moving the perimeter fence. This also would remove any barriers to transferring ownership of the facility and grounds to the LEA.
- Arrangements, such as a long-term lease, appear possible for LEA use of the second Laurel Bay facility.

Factors which impede a transfer:

- Even though it is a housing area, Laurel Bay is a closed installation.
- LEA schools are overcrowded and do not have the space to accommodate the Laurel Bay students.
- The two Laurel Bay facilities have $1.8 million in unfunded construction needs.
- Under current Impact Aid guidelines, Beaufort County would not be adequately reimbursed for its local contribution. The shortfall would be about $1,400 per student.
- Base parents are concerned that the LEA would reassign Laurel Bay students living at Parris Island or the Naval Hospital to geographically closer LEA schools.
- The LEA would reassign neighboring LEA students to fill the Laurel Bay facilities, thus increasing outside traffic in a closed housing area.
- Laurel Bay parents would not want to lose the influence they have over the education of their children through electing and running their own school board.
- Laurel Bay parents and faculty perceive that their Section 6 school is better able to meet the needs of military dependents.

OPTIONS TO CONSIDER

Two options can be considered: No transfer and transfer to Beaufort County using the assisted option.

1. **No Transfer:** Continuation of the status quo remains a viable option for two reasons. First, the Laurel Bay schools are geared to the needs of the transient military child, providing more individualized assistance than is available from the LEA. Second, parents can maintain input into the education of their children through election of their own school board.
2. **Transfer with an Assisted Option:** Transfer to Beaufort County can be considered, although a number of issues need to be addressed. First, the county could be compensated for its local contribution, using the assisted option in place of Impact Aid. Second, some provision would have to be made for facilities. One school on the edge of the Laurel Bay housing area could be turned over to the LEA after simply moving the perimeter fence. LEA use of the second school, which cannot be detached from the surrounding federally owned land, could be more difficult to arrange if Air Station officials object to LEA students attending the facility. Some agreement could be reached on traffic control in the housing installation. LEA officials point out that it is difficult to imagine elementary students constituting a security threat. And there appears to be no military reason for operating Laurel Bay as a closed installation. A solution of last resort would be to construct a substitute facility outside the housing area using federal and/or local funding. Third, military dependents at Parris Island and the Naval Hospital would attend LEA schools, in which they may well constitute a minority of the school enrollment. Such a transition could be eased if the LEA provided some mechanism or forum for these base parents to input their concerns about the educational needs of the transient military child.

XV. MYRTLE BEACH AIR FORCE BASE, SOUTH CAROLINA

BACKGROUND

Myrtle Beach Air Force Base (AFB) is the home of the 354th Tactical Fighter Wing, which serves as the first operational A-10 wing in the Air Force. This mission is supported by the base's 354th Combat Support Group and the 2066th Communication Squadron. The base first served as an Army Air Corps station from 1940 to 1942, when it became an official Army Air Base. As part of demobilization after World War II, the base was closed in 1947; at the urging of local officials, the airport facility was transferred to the Air Force in 1954.

In 1975, arrangements were made for the joint use of the Myrtle Beach AFB runway by military and civilian planes. Currently, the east side of the runway is used by three commercial airlines under the operation of the AFB. The base remains a highly secure, limited access facility; air traffic on the commercial side of the runway is closely monitored at all times.

Geography and Economy. Myrtle Beach AFB occupies the southeastern corner of the city of Myrtle Beach, a growing resort area. The base is moderately sized, supporting about 3,500 military personnel with 8,000 dependents, and employing approximately 700 civilians. The base's 5,700 acres occupy less than one percent of the county's land area.

The base is a major contributor to the local economy. Myrtle Beach AFB's payroll, over $79 million in 1984, makes it the county's largest single employer, accounting for a substantial share of the county payroll. In addition, 55 percent of base military personnel and dependents reside off base. Base officials estimate that 3,000 military retirees have settled in the area.

History of the Myrtle Beach AFB Section 6 School. Segregation in the local elementary schools led to the creation of a Section 6 school in 1963. The school serves students in kindergarten through the eighth grade and uses a middle school approach, with sixth- through eighth-grade students receiving departmentalized instruction, rather than instruction in a "self-contained" classroom. All grades attend a single facility, Woodland Park School. Although past enrollments have been as high as 1,400, the school's enrollment during the past decade has been around one-half that number. In 1988, enrollment reached a ten-year high of 716. All Woodland Park School students walk to school.

BACKGROUND--HORRY COUNTY

Geography and Economy. Horry County borders North Carolina to the north and the Atlantic Ocean to the west, stretching inland up to 40 miles and south 30 miles. The city of Myrtle Beach is located on the coastline, about 22 miles south of the North Carolina border. Due to extensive growth in the tourist industry along the coastline, the county population increased 25 percent from 1980 to 1984, with projections showing continuing high growth. While Myrtle Beach itself is continuing to grow, the less densely populated county areas to the north, south, and west of Myrtle Beach are expected to show the greatest increases in population growth; by 1990, the county could almost double its 1980 population of 100,000.

In addition to Myrtle Beach AFB, the major contributors to the county's economy are tourism and farming. Horry County's coastline makes up about one-half of the "Grand Strand," a 60-mile stretch of seaside resort areas and the largest tourist attraction in the state. Agriculture predominates in the interior of Horry County.

Horry County School System. Reflecting county growth, the Horry County school enrollment has increased 22 percent since 1980-1981, and is projected to increase another 10 percent by 1990. The county's 1987-1988 enrollment of 24,285 makes it the fifth largest school system in South Carolina. The district currently provides kindergarten through twelfth grade education in 39 schools, including three career centers, and uses a middle school approach.

FACTORS INFLUENCING TRANSFER

The decision on whether and how best to transfer the base school depends on a number of characteristics of both the Myrtle Beach and Horry County school systems. Some of these characteristics are compared in Table 20.

School Population. The school enrollments listed in Table 20 show that if the base schools were transferred, the students could easily be absorbed by the local system. The base students would increase the local enrollment by only 3 percent.

Horry County already educates a number of military dependents, including 92 base high school students and 484 military dependents living off base. This constitutes 44 percent of the area's military dependent students, but only 2.4 percent of the total county enrollment. Adding the Section 6 students would increase the number of military dependents to 5.3 percent of the county enrollment.

Table 20

MYRTLE BEACH AIR FORCE BASE AND HORRY COUNTY SCHOOL DISTRICTS

Item	Myrtle Beach AFB		Horry County
Enrollment (SY 1987-1988)	701		24,285
(Ratio Myrtle Beach to LEA)		(1:34.6)	
Grade span	K-8		K-12
Number of schools	1		39
Elementary	1		21
Middle School	-		8
High School	-		7
Other (career centers)	-		3
PPE (FY 1987)	$3,338		$2,891
Pupil/teacher ratio	13.3		16.8

Interactions Between the School Systems. The base school and Horry County cooperate in making the transition of eighth-grade students to the LEA high school as smooth as possible. Horry school personnel provide an on-base orientation for eighth-grade students, and student visits to the local high school are arranged for each graduating eighth-grade class. Base faculty have adjusted the curriculum so that base students enter high school with comparable course work.

Facilities. The base's Woodland Park School is owned by the U.S. Department of Education on property leased from the Air Force, under an agreement that stipulates that the facility reverts to the Air Force if it is not used as a school. The facility consists of three connected buildings. The school was renovated in 1987-1988, including the addition of ten classrooms and expansion of the library and cafeteria. In spite of this recent expansion, four portable units are currently in use. The facility itself is well maintained and in good condition.

LEA schools are being used at or exceeding full capacity. To accommodate growing school enrollments, Horry County has just spent $80 million on the construction of seven new schools, as well as renovations and additions to many existing school facilities. County school officials recently tried to obtain a $60 million bond issue to expand and renovate their facilities, but only $30 million was approved. As a result, the county has reduced its use of portable classrooms to 300. County officials expect that future construction will be necessary to accommodate projected enrollment increases.

Because the county school system is operating at capacity and expects further enrollment growth, the county would need the use of the current base facility, or its equivalent, as part of a transfer agreement.

School Ownership and Access to the Base. Myrtle Beach AFB is a closed base, under tightly controlled security regarding admission to the base. LEA buses are allowed on base to transport high school students to an off-base school. To minimize security risks, only military dependents are in the bus when it is within the base perimeter (i.e., on-base students are the first to be picked up in the morning and the last to be dropped off in the afternoon). There have been no problems with this arrangement, and the base commander would not mind extending this type of arrangement if necessary.

However, should a transfer occur, the base commander has serious reservations about allowing LEA students to attend the base school; he views this as a situation which would create unacceptable security risks because base access would have to be granted not only to the local students but also to their parents and others attending school functions. The commander would be willing to accept a transfer arrangement that kept the Woodland Park School as a school serving *only* military dependents. In this case, he would request clearances for all school staff.

County officials are sensitive to the issue of base security and are willing to make compromises to accommodate this concern. Thus, although Horry County officials would prefer the option of assigning LEA students to the base school, they are willing to assign only base students, if certain conditions are met. Both base and county officials are amenable to a long-term lease arrangement for LEA use of the facility.

School Assignment. In the event of a transfer, the county leaders indicated they would reassign the base grade six through eight students to a nearby, newly constructed middle school, which has the capacity to accommodate the base students. Taking into consideration the base commander's security concerns, these county leaders would be willing to keep the school at less than full capacity, with only base kindergarten through fifth-grade students, as long as the school's enrollment was at least 500 (the size of an average county elementary school).

Such an arrangement appears possible. Currently, 180 of the base school's 716 students are in grades six through eight. Thus, a transfer of these students would leave 536 kindergarten through fifth-grade students at Woodland Park School. Base officials note that enrollment growth has been predominantly in the early elementary grades. Therefore, if the composition and size of the base personnel remain the same, the base would probably meet the local district's enrollment requirement, thus preserving their neighborhood elementary school.

Horry County is under no court order concerning school assignment. Both the county and the base enrollments are 30 percent minority.

LEA Financing. Horry County depends heavily on locally generated funds to operate the county school system. Local revenue sources accounted for 65 percent of the $54.5 million in the FY 1988 school district's general fund. In FY 1989, anticipated revenues increased by over $10 million, with the local share increasing to 67 percent. During the same two years, the relative state contribution declined from 35 to 32.2 percent. Federal revenue (Impact Aid) accounted for less than one percent. This trend has been fairly consistent during the past decade. For example, the local contribution was only 50 percent in FY 1985.

Local educational funding is generated through property taxes. The school board submits the budget to the county's legislative delegation, which sets the millage rate. The county has been aided by the extensive growth in property values during the last decade, due to the booming resort industry.[1] One result is that South Carolina, which adjusts the state share of operating costs based on an index of tax paying ability, has forced Horry County to pay for an increasing share of the school budget. Thus, in SY 1986-1987, Horry County's local taxes for the school district's current operations contributed $1,297 per pupil, ranking the county as tenth among the state's 91 school districts. County officials anticipate that this trend will continue as the county continues its economic growth.

Because the local contribution accounts for a relatively high proportion of the funding, federal Impact Aid would not adequately recompense the county in the event of a transfer. The county is classified as a Regular A district because of its education of high school students living on the base. As a Regular A district, Horry County qualifies for the lowest payment in that category. The addition of the Myrtle Beach Section 6 students would not change that classification. During FY 1988, Regular A payments were about $565 per

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[1] To demonstrate the extent of this growth, from 1978 to 1986 the assessed value of personal property increased 75 percent, while the assessed value of real property increased by over 350 percent.

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pupil. Horry County officials estimate that this would represent a shortfall of about $1,500 per pupil, compared to the anticipated local contribution. This would cost the county about $1.12 million, or an addition of about 2 mills to the projected 81.4 mills for the general operation of the school district in FY 1989.[2]

School Board Voting and Representation. The Horry County School Board has seven members elected at-large for four-year terms. Because only a small percentage of the base parents claim Horry County residence, it is doubtful that the base parents would have much influence on school board elections. In addition, county officials doubt that the school board would create an ex-officio position for a base representative.

Should a transfer occur, base parents would have an alternative means of input available, as the county has community-based advisory boards in each local school area. There are no residency requirements for serving on an advisory board; therefore, base parents would be eligible to serve on the local School Improvement Council.

Employee Status. The Woodland Park School employs 73 staff members, including 54 teachers, two administrators, seven teacher aides, and 17 other support staff members. Employees raised a number of questions about their status after a transfer. The following address some of these concerns, especially for the teachers.

Job Security. Horry County would hire all Woodland Park School employees if a transfer were to occur, although teachers would have to be state-certified; five Woodland Park School teachers currently do not have South Carolina teaching certificates. The Woodland Park School principal would be in charge of evaluating the teaching staff, and questions of future employment would remain school-controlled.

Not all of the present staff would be assigned to Woodland Park. Middle school teachers would be transferred with their students to LEA schools. Teachers whose LEA counterparts serve itinerant positions would also receive several school assignments. And some support staff could be reassigned to other schools.

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[2] The FY 1989 school budget projects that one mill is approximately $536,725, with a collection rate of 92 percent, or a net value of $493,787.

Years of Experience. The county would place base teachers on the district salary schedule according to their years of experience and degrees earned, just as they would for any other teacher transferring from another South Carolina school district.

Salary. Base teachers are concerned that if they were employed by the district, they would earn a lower salary than they do now. As Table 21 shows, Woodland Park School teachers, with few exceptions, are paid more than Horry County teachers. In the event of a transfer, most base teachers would experience a pay cut of $500 to $2,000. For some teachers, this wage difference might be made up by merit pay, which the county offers.

Benefits. Base personnel perceive that Horry County provides more and better job benefits, in terms of paying for health and retirement programs, than does the federal government. The state program includes Blue Cross/Blue Shield basic coverage at no cost to the employee, or health maintenance organization (HMO) coverage at a nominal fee. There is an optional dental insurance plan. South Carolina allows newly hired teachers to transfer up to 90 days of sick leave from elsewhere in South Carolina. Unlike the base, the sick days can be cashed out when leaving county employment.

On the other hand, base employees are concerned about transferring their retirement investment from the federal government. Buy-ins to the South Carolina retirement plan are prohibitively expensive; one-tenth of the current salary for each year purchased. The federal and state governments might arrange for a less costly buy-in as a part of the transfer of Section 6 schools.

OTHER CONCERNS OF PARTIES INVOLVED

Quality of Education. Base parents and teachers are concerned that the education of the Woodland Park School students would suffer if the school were transferred. Many of their concerns echo those expressed at other bases: The base school provides a community school that is

Table 21

DIFFERENCES BETWEEN THE MYRTLE BEACH AFB AND HORRY COUNTY SALARY SCHEDULES (1988-1989)

Years of Experience	Myrtle Beach AFB Teachers' Salaries ($)	Horry County Comparison ($)
Bachelors degree		
Beginning	$19,396	-$1,159
10 years	23,567	- 407
20 years	27,739	+ 493
25 years	29,825	+ 1,225
Bachelors + 18		
Beginning	20,222	- 1,165
10 years	25,166	- 1,095
20 years	30,110	- 897
25 years	32,582	- 487
Master degree		
Beginning	22,057	- 1,177
10 years	27,619	- 1,266
20 years	33,181	- 1,213
25 years	35,962	- 824
Masters + 30		
Beginning	23,894	- 1,190
10 years	30,074	- 1,897
20 years	36,254	- 2,321
25 years	39,344	- 2,111

structured to meet the special needs of the highly mobile military child. Teachers mentioned the following services, which are provided exclusively or better at the base school: a big brother-big sister program; a lower pupil/teacher ratio, including more guidance counselors for middle school students; a high level of parent involvement; and more personal attention for special needs students.

Base parents and teachers also believe that the local district has more limited funding for materials and special services, and thus cannot offer as rich an educational program as can the base school. Base teachers feel that South Carolina's strict accountability requirements detract from local teachers' teaching ability by increasing their paperwork load and encouraging "teaching to the test."

Base parents noted that there are few alternatives to the Woodland Park School. There are about seven private schools in the region, but most of these are religiously affiliated and all charge sizable tuitions.

DECISION SUMMARY

There are a number of facilitating and impeding factors influencing the readiness of the Woodland Park School for transfer to the local school district.

Factors which facilitate a transfer are:

- Horry County has clear jurisdiction.
- The base school is small relative to the LEA, which should have little trouble absorbing the additional students.
- Horry County schools already educate over 90 base high school students and almost 500 military dependents living off the base.
- Horry County has a healthy, growing tax base.
- A lease arrangement for LEA use of the base school facility is acceptable to both base and LEA officials.
- The LEA is under no desegregation order influencing the school assignment of students.
- The LEA would continue to assign base kindergarten through fifth-grade students to the Woodland Park School.

Factors which impede a transfer are:

- Impact Aid would not cover the local contribution. There would be an approximate $1,500 shortfall per pupil.
- The LEA schools are over capacity, so Horry County would need the use of the base facility or a substitute.
- Horry County would reassign the base middle-grade students to nearby LEA schools.
- The base is a secure, closed installation. The base commander is wary of granting access to outside students attending the base facility.
- Base parents would not want to lose the influence they have over the education of their children through electing and running their own school board.
- Base parents and faculty perceive that their Section 6 school is better able to meet the needs of military students.

OPTIONS TO CONSIDER

Two options can be considered: No transfer and transfer to Horry County using the assisted option. Because state funding is tied to local taxation, the coterminous option is not an alternative in South Carolina.

No Transfer. The status quo can continue for two reasons. First, base parents and administrators are satisfied with a school which is better equipped to meet the special needs of military children and provides a resource-rich curriculum. Second, parents can maintain input into the education of their children through election of their own school board.

Transfer to Horry County Using the Assisted Option. Transfer to the LEA also can be considered, although several issues must be addressed. The primary concerns of Horry County officials are financing and facility transfer. By using the assisted option, the county would be fully compensated for its local contribution. The LEA could use the base school if only base residents are enrolled at the facility. If an agreement acceptable to base and LEA officials concerning school assignment can be reached, then the major impediments to a transfer agreement would be removed.

Without some agreement on LEA use of the base school, additional problems arise. Transferring the base elementary students to LEA schools, which are already at capacity, would result in overcrowding. The only alternative would be the construction of a substitute school outside the base. However, funding for a new building could be difficult to obtain, since local taxpayers might not support a bond issue to benefit the children of non-taxpaying base residents. Such an alternative might need state or federal funding support. In addition, if the LEA could not use the present base facility, base students would lose their neighborhood school. Elementary school children, who currently walk to school within a secured area, would be bused off the base.

Whatever the disposition of the base facility, transfer to the LEA would result in the reassignment of base students in the sixth through eighth grades to LEA middle schools. The enrollment is simply too small to justify running a separate middle school on the base.

Finally, any transition could be eased if the LEA provided a mechanism or forum for the base parents to input their concerns about the educational needs of the transient military child.

XVI. THE STATE OF VIRGINIA

Rankings by educational indicators generally place Virginia in the mid-range of the nation. For example, Virginia ranks 31st among the states in terms of per-pupil expenditure (PPE) and 27th in high school graduation rate. As in all states, the individual districts vary. However, those districts in the northern portion of the state tend to have good, nationally recognized reputations.

EDUCATION PROGRAM

In 1986, the Virginia General Assembly enacted standards of quality for the public schools.[1] Although the State Board of Education and local districts control how the goals and programs set out by the Act are met, the legislature has provided an overall framework which emphasizes basic skills development, career preparation, staff development, and community participation. The guidelines include the following:

- An extensive testing program which includes yearly tests for basic skills in elementary grades, statewide assessment testing for grades 4, 8, and 11, and a minimum competency test to receive a high school diploma.
- Provision of education programs for career preparation (academic and vocational), handicapped students, gifted and talented students, and alternative education.
- Staffing requirements, including teacher/pupil ratios and provision of remedial personnel.
- Six-year school improvement plans, developed with community participation and reviewed biennially.

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[1] Current legislative guidance is in effect until July 1, 1988. Failure of school divisions to provide the programs and services prescribed can result in the state filing a writ of mandamus with the appropriate circuit court to require compliance.

SCHOOL FINANCING

Virginia state and local funding of public education comes from a variety of taxes. State education funds are derived primarily from income and sales taxes. The state allows local governments to levy taxes on real estate, personal property, and utilities. In addition, the state distributes directly to the localities, based on the school population, the proceeds of a one-cent retail sales tax for education.

On average, the state contributes about 47 percent of each school district's per-pupil expenditure. Most of this funding comes from the state's Basic Aid Program, which provides funds toward a minimum educational program, distributed on an equalized basis. To obtain these funds, districts must supply a minimum local effort which is scaled to local ability to pay. In addition, the state contributes funds toward specific educational programs or needs, and sometimes provides one-time funding to ameliorate the extra local cost of changes in requirements. For example, in addition to Basic Aid, local districts in FY 1988 could receive state funds toward a pilot gifted and talented program for kindergarten through grade 3, vocational education equipment, adult education, and the expenses associated with the accreditation process.

The state does not directly fund capital outlays for school construction. Local districts can get assistance from the state's Literary Fund and the Virginia Public School Authority. The Virginia Public School Authority provides low-interest loans and access to tax-exempt bond markets, which qualifies the localities for AA bond ratings. The state imposes no caps or limitations on borrowing, but some cities and county governments have limits on total indebtedness.

The state does provide funds for the transportation of students which supplement the operational costs. However, the state does not fund the initial purchase of a bus fleet, although it does contribute toward bus replacement.

STATE POLICIES AND THE SECTION 6 SCHOOLS

State policies and the preferences of school officials influence the conditions under which a transfer of the Quantico Marine Corps Base and Dahlgren Naval Surface Warfare Center Section 6 schools could take place.

Jurisdiction: State officials gave a somewhat ambiguous response to the issue of jurisdiction. Several state school districts, including Arlington, Fairfax, and York counties, already educate military dependents living on base. State officials point out that under the Virginia State Code,[2] local school boards have discretionary power over the admission of students residing on military reservations within their jurisdiction who are not domiciled residents of the state.

Financial Burden: The key to the transfer, in the opinion of the state leaders, is the provision by the federal government of adequate financial backing. State educators are not as concerned with the state's burden. State funding follows the child and, therefore, the local school districts accepting the transfer would receive the standard state per-pupil revenues for base children. These officials do worry that the local school districts, dependent on local financing for almost one-half of the per-pupil expenditure,[3] will not receive adequate compensation through the federal Impact Aid program.

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[2] See Section 22.1-5 of the Code of Virginia: "Regulations concerning admission of certain persons to schools; tuition charges. The following persons may, in the discretion of the school board of a school division and pursuant to regulations adopted by the school board, be admitted into the public schools of the division and may, in the discretion of the school board, be charged tuition: Persons of school age who reside on a military or naval reservation located wholly or partly within the geographical boundaries of the school division and who are not domiciled residents of the Commonwealth of Virginia; provided, however, that no person of school age residing on a military or naval reservation located wholly or partly within the geographical boundaries of the school division may be charged tuition if federal funds provided under P.L. 874 of 1950, commonly known as Impact Aid, shall fund such students at not less than fifty percent of the total per capita cost of education, exclusive of capital outlay and debt service, for elementary or secondary pupils, as the case may be, of such school division."

[3] In SY 1985-1986, the average local contribution in Virginia was 47 percent of the per-pupil expenditure. See Table 11 in *Facing Up--21: Statistical Data on Virginia's Public Schools*, published by the State Department of Education, Virginia, June 1987.

State officials suggest one possible response to such perceived inequities may be the charging of tuition by local school districts. Again, they cite the Virginia State Code as giving local school boards discretionary power to charge base dependents tuition if Impact Aid funds do not cover 50 percent of the per-pupil cost.[4] Similar laws exist in other states; however, court rulings have prevented the few attempts made to require tuition payments. State education officials indicate that transfer without adequate funding could lead to another such court battle.

Coterminous Option: Although creation of a coterminous school district is legal, state leaders cite a number of issues that must be resolved before the State Education Department could consider it a realistic option.

- The State Assembly requires approval of the local governing body to form a new district. In the case of the military base, who is the local governing body?
- State Basic Aid is distributed under an equalization formula based on local contributions. Since bases have no "local tax base," how would the state determine its share of a minimum education program?
- The state requires accountability of its local educational officials and agencies. State officials argued that the frequent turnover of military parents serving on a base school board would make accountability difficult.
- A coterminous base district would lack the financial resources for major capital outlay.
- Creating new districts runs counter to the state's promotion of consolidation.

For all of these reasons, state officials do not consider the coterminous district a viable option. As detailed in R-3647-FMP, we agree that this option is generally not a viable solution.

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[4] See Section 22.1-5 of the Code of Virginia, fn 3.

Facilities: State officials said the acceptability of a facilities transfer is related to the provision of adequate financing. Much depends on the condition of the facilities, ownership of the facilities, and long-term maintenance funding.

One reason state officials are concerned about this issue is their experience with the transfer of the Fort Belvoir Section 6 schools to Fairfax county in 1969. Under the agreement, Fairfax leases the three school buildings from the Army base. Because local funds cannot be applied to major renovations unless the school district owns the facility, Fairfax is dependent on the federal government to maintain the buildings. No construction funds have been appropriated for that purpose since the transfer. Meanwhile, the facilities continue to deteriorate.

State officials indicate they would strongly suggest to the local districts involved that the transfer or lease of the base school facilities be rejected unless the buildings are in good condition and up to code. In addition, state officials argue that the federal government should contribute funding for the maintenance of those facilities after transfer and for the building of replacement facilities as they become necessary. Finally, the state would require guaranteed access to the property.

One suggested alternative for solving these issues is for the federal government to retain ownership and contract with the local school district for facilities maintenance. Thus, if the federal government did not provide the necessary funds, the school district could void the contract and be relieved of any responsibility for the buildings. The bottom line is that state officials want local districts held harmless concerning the current and future financial responsibilities for the facilities.

Governance: School board members are appointed by either the local governing body or a school selection committee appointed by the grand jury. The membership size and length of term is also determined locally. Thus, whether military personnel would be appointed is an open question. There is no tradition of ex-officio representation.

The LEA has no tax raising authority. Taxes are levied by the city or county commissioners who must approve the school budget.

Employees: State officials point out that the local school district will determine most of the conditions under which Section 6 employees would be hired. For example, unlike other states surveyed in this study, there is no state minimum salary schedule and all the benefits, except retirement, are determined locally. However, state policies do influence three aspects of employment: certification, tenure, and retirement.

Certification. The state requires all teachers to be state certified, a requirement Section 6 teachers already meet.

Tenure. State tenure policies require that a new or out-of-state teacher be employed for three years in the local system before qualifying for tenure. However, the state grants the local district some discretion over whether Section 6 teachers would be considered as coming from out-of-state. Thus, in the event of transfer, the local district has the authority to grant full tenure without any waiting period; to require a one-year waiting period for an in-state teacher; or to require the full three-year period.

Retirement. All local school employees are required to belong to the Virginia Supplemental Retirement System (VSRS). For new employees entering the system with prior service in another public retirement system, VSRS provides a buy-in option but under disadvantageous terms. First, the employee must have at least five years of service in the Virginia system before a buy-in is allowed. Second, each year of service bought costs 15 percent of the current or highest average salary. Third, there are limits on the number of years that can be purchased. Finally, the purchase of prior service does not count toward the 30-year requirement for retiring with full benefits before the age of 65.

Thus, of the three employment issues, retirement is likely to be the most problematic. Section 6 teachers would suffer under a transfer unless special protection is afforded.

XVII. DAHLGREN NAVAL SURFACE WARFARE CENTER

BACKGROUND: DAHLGREN NSWC

Dalhgren Naval Surface Warfare Center is the principal Navy center for research, development, testing, and evaluation of surface ship weapon systems, ordnance, mines, and strategic systems. It was founded in 1918 when the Navy transferred its weapons testing facility from Indian Head, Maryland to a new base at Dahlgren, Virginia. With the beginning of World War II in 1940, weapons research and development programs began at the base. In 1974, Dahlgren was consolidated with other missions into the Naval Surface Warfare Center. Three major commands are located at Dahlgren: Naval Space Surveillance System, the Naval Space Command, and the AEGIS Training Command.

The base is relatively small compared to others. Dahlgren currently has 437 military personnel of which 243 or 56 percent live on base. Civilian personnel associated with the base number approximately 3,530. The base covers approximately 4,322 acres of King George County, which covers 115,200 or 180 square miles. The nature of research work at the base and the danger of explosions require that the base maintain a high level of security. Access is restricted to the entire base, and certain parts of the base require even more stringent access arrangements.

History of Section 6 School. In 1918, the Dahlgren area was a remote location and unable to provide an education for those dependents living on base. Therefore, in 1919 the Navy established the Dahlgren school for the younger dependents living on base. Older children in grades 9 through 12, however, attended the local schools of King George County. In 1942, the base built the Dahlgren school that is still used today. In 1950, two quonset huts were added to the school building to form a small complex.

In 1952, the school became a Section 6 school. It remains today as the smallest of the 18 Section 6 schools with approximately 130 students in grades kindergarten through 8th. It normally has approximately 150 students, but the rehabilitation of several housing units has reduced temporarily the on-base housing population. The base has 154 housing units. The 19 students in grades 9 through 12 continue to attend King George County schools, along with two handicapped students from the base.

BACKGROUND: KING GEORGE COUNTY

King George County, with a population of 10,543 in 1980, is outside of the Washington, D.C. metropolitan area in the countryside of Northern Virginia. The nearest large community is Fredricksburg. Although near to the growth area of Washington, D.C., King George has not experienced the rapid growth common to the region. Many area residents commute to Fredricksburg for employment, work on farms in the community, or are employed in connection with the base.

The county has a single school system with an average daily membership of approximately 2,416 in 1987-1988. The recent student growth rate has been about three percent per year.

FACTORS INFLUENCING TRANSFER

Table 22 presents data on a number of characteristics which influence the feasibility or ease of a transfer.

School Population. As Table 22 illustrates, the base school population is small compared to the county. If a transfer took place today, students who live on base, including the 9th through 12th graders, would constitute only six percent of the county school population.

The county already educates some base-related children. In school year 1988, these included 21 9th through 12th graders and handicapped students who live on base, 73 children of military parents living in the local community, and 570 children of civilians who work on base. Altogether, about 27 percent of the county school population in school year 1988 is connected to Dahlgren. Adding the Section 6 school children would raise this total to 31 percent of the county school population being connected to Dahlgren.

Table 22

COMPARISON OF SCHOOL DISTRICTS

Item	Dahlgren	King George County
Enrollments (1988)	147	2,416
(ratio of base to LEA)	(1:16.4)	
Grade span	K-8	Pre-12
Number of schools		
Elementary	1 (K-8)	2 (Pre-5)
Middle		1 (6-8)
High		1 (9-12)
PPE (SY 1987-1988)	$5,347	$3,624

SOURCE: Dalhgren expenditures and enrollments are taken from a computer printout from the Office of Dependents Support Policy dated January 26, 1988. King George expenditures and enrollments are from the Virginia Department of Education, *Facing Up--23 Statistical Data on Virginia's Public Schools*, April 1989.

Although the county has experienced some growth, the base is expecting more rapid growth in the near future that will eventually affect the county. The base military population is expected to grow from 437 in 1988 to 808 in 1993. In turn, the number of base military youth dependents is expected to rise from 288 in 1988 to 310 in 1993. Additional children, approximately 100, may be associated with trainees.

Interaction Between School Systems. Relations between the two school systems appear to be regular and amicable. The King George system has always had access to the base to transport the base children attending grades 9 through 12 and any handicapped students that the base schools cannot accommodate. The children attend the single county high school approximately ten miles away. Transportation costs and the costs of the base children's education are provided by the county, with the state picking up its normal contribution per student.

The Section 6 school administration monitors new state and local requirements to offer a comparable education. In addition, it does so to ensure that the Section 6 children transferring into the King George County system are adequately prepared, have taken the required courses, and are more easily able to adjust to the new school.

The issue of possible transfer and increased growth on the base has promoted more interaction between the two systems. The base and King George County have had several discussions about the impact of the projected base growth on the community, including the schools. The county, after being informed of the transfer issues, passed a resolution in June 1988 against any transfer "without adequate federal and/or state funding, recognizing the devastating financial impact to the tax payers of this small, rural county."[1]

Facilities. The school facilities are located in the middle of the single housing area on the base. This housing area is in a secure area, but not the most stringently guarded area. The children who attend the Section 6 school are all within walking distance. No buses are necessary.

The school facility at Dahlgren consists of one school building dating to 1942 with two attached quonset huts dating to 1950. Although kept in good repair, the quonset huts need to be replaced because they do not meet health and safety standards. There are no asbestos problems.

The Dahlgren school is not overcrowded at this point. The number of students per classroom is low: between 12 and 18 in each grade. The problem with the physical plant is the need for new or updated facilities for special programs such as music or special education. In addition, the school has no cafeteria; children are sent home for lunch or to the base day care center. The facility has no gymnasium; children walk across a greenway to the base recreation facilities for physical education classes.

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[1] King George County Board of Supervisors, Resolution, June 2, 1988.

Plans were submitted in 1986 for the removal of the quonset huts and replacement with an addition to the school building. The addition proposed is a 2,000 square foot brick and mortar building with space for physical education, a computer laboratory, a music/multi-purpose room, kindergarten, special education rooms, and storage rooms. The project was denied funding. In 1988, it was resubmitted with a cost of $183,000, but denied funding.

The unusual nature of title to the Dahlgren Section 6 schools makes it difficult to transfer the facility to King George County. Most Section 6 schools were built with P.L. 810 funds and title was and still is held primarily by the Department of Education. Schools built with P.L. 810 funds must be used for education. At Dahlgren, however, the Navy built the school and owns title to the buildings and land. The Navy can choose to use these buildings as it pleases. For example, in the summer when no classes are offered, the Navy has used the building for office space.

Base representatives stated that they would not consider transferring the school facilities and land to the LEA for several reasons. First, the Navy facilities at Dahlgren are extremely cramped. The base is looking for additional office space or land upon which to build office space. They would prefer this use for the school facilities rather than transferring them. Second, the facilities are inside the secure perimeter of the base. The base commander prefers to keep control of the land and buildings to avoid security concerns. We note, however, that base officials may not be the only decisionmakers involved. Higher authorities in the Navy may choose other uses for the school facilities.

King George County, in contrast to Dahlgren Section 6 school, is now crowded in grades kindergarten through 5th. Its two elementary schools hold 1,088 children in preschool through 5th grade, but educate 1,182 as of September 1988. The additional children are housed in temporary trailers. The county has plans for an addition to the Potomac Elementary School, the school closest to the base, to accommodate growth in the county. The addition will add capacity for 500 more students at the school, raising the total capacity for grades kindergarten through 5th to 1,588. The new addition, waiting for state approval and funding, was scheduled to begin construction in early 1989 and be finished in June of 1991. At that time, the King George school system would have enough extra capacity to accept the transfer of the Section 6 kindergarten through 5th graders without need for the transfer of the Dahlgren Section 6 school facilities.

There is extra capacity at the county middle school and the high school. The middle school, with 541 students, has space for 614 students. The high school has space for 900 students, but has only 718. Transfer of the 30 Section 6 middle graders (6th through 8th) would not result in overcrowding the LEA middle school at this time.

The county is well aware of the situation at Fort Belvoir, where students were transferred to Fairfax County in 1969 but the facilities were not. In the interim, Congress has refused to appropriate over $10 million in needed renovations for the Belvoir schools. The state and local jurisdictions have been very displeased with this arrangement. Thus, King George and Virginia state officials are concerned about using the base school. As with other sites, facilities transfer cannot occur without LEA title to the buildings, access to the facilities, and the facilities being in proper condition. Furthermore, the state of Virginia representatives have argued that the federal government should be financially responsible for the future upkeep of any transferred buildings and for construction of additional capacity if the base student population grows.

Without the transfer of the base facilities, King George cannot accept the transfer of the Section 6 kindergarten through 5th graders until the completion of the addition to Potomac Elementary school. At that time, the students could be transferred and would attend Potomac, the closest school. Immediate transfer of the 30 base 6th through 8th graders would not crowd the LEA middle school. Thus, given the current LEA facilities plans, transfer of the base students can be accomplished without transfer of the facilities and without overcrowding the LEA facilities.

If transfer seriously is being considered, however, attention must be paid to the current plans for the addition to Potomac Elementary. Ground has not yet been broken, thus there is time for considering the best means for consolidating the transfer of the Section 6 elementary population into county plans for the use of the new addition. Additional classroom space might be planned. The funding could be negotiated between the different levels of government to ensure the proper allocation of financial responsibility.

Access to Base Schools. King George County school buses transport 9th through 12th graders on and off the base every school day. The base command and the LEA have developed workable arrangements to provide access while ensuring base security.

Under a transfer, the current arrangement can be expanded to include additional buses for the kindergarten through 5th graders attending Potomac Elementary. However, due to security considerations, base officials would be uncomfortable giving the LEA access to run schools on the base.

The stance of the base in terms of facilities transfer reduces concerns over security or logistics held by the base commander. If the facilities are not transferred, the base need not be concerned over non-base personnel entering and exiting the base daily. Children would be bused on and off the base, but this is already done and does not present new problems.

LEA Financial Resources. The local government has not imposed financial restrictions on the growth in the LEA budget. Under current law the LEA submits its proposed budget to the county board of supervisors for approval and appropriation each year. Last year, the LEA asked for a budget increase of 35 percent, but received an increase of 18 percent. Otherwise, there are no laws or tax caps that reduce the amount of money the LEA can budget for education.

The state of Virginia, on average, provides strong financial support for education; for the past several years the state's average PPE has ranked in the middle of all states at between 25 and 30 out of 50 states. King George's PPE, however, tends to fall below the state average. King George had a PPE of $3,624 in 1987-1988, below the state average of $4,069 and below the national average. Of counties in the state, King George's PPE ranked in the 33 percentile.[2]

The local contribution of the King George LEA also is less than the average for the state and nation. Approximately 36.6 percent of the LEA's expenditures were raised at the local level, whereas 56.5 percent came from the state. The average district for the state of Virginia raised 47.5 percent of its revenues locally and the state contributed 46.9 percent.

Whereas most of the LEA financial resources for education are provided by the state and local governments, 6.8 percent comes from the federal government. Currently, King George receives federal Impact Aid funds for the federally connected children attending its schools. They qualify for Regular A funding, $629 per student, for the base high school students, and Super B funding, about $151 per student, for those students living in the community, but whose parents work for the federal government. These B students number about 790 of which 73 are children of military parents and 570 are children of civilians connected to the base. The funding in these categories has recently been reduced. LEA officials told us that the Regular A student received approximately $450 in school year 1988. Impact Aid funds have become so uncertain that the district no longer includes them in the budget, but treats them as a windfall if they are received.

Should a transfer occur, the county would be penalized financially. The Dahlgren base children would constitute about seven percent of the King George school enrollment. Therefore, the Impact Aid status of the LEA would not change. It would still be a Regular A and Super B district. This would result in a considerable shortfall of funds on a per-student basis for the base students. For instance, the LEA local contribution was $1,328 in 1987-1988. Impact Aid would cover only $629, leaving a shortfall in funds of $699 per base child that would have to be made up at the local and state level.

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[2] This and the following data are from the Virginia Department of Education, *Facing Up--23 Statistical Data on Virginia's Public Schools*, April 1989.

In addition, should a transfer occur without the transfer of facilities the county would be responsible for the transportation of the base children to schools in the community. This will require the up-front purchase of buses and the addition to the county budget of transportation costs. The transportation of the 6th through 8th graders to the middle school might require the purchase of one bus. The transportation of the kindergarten through 5th graders might require the purchase of up to two buses. Special education children must be bused separately on smaller, specially equipped, buses that the county may have to purchase.

School Board Voting and Representation. Currently, the base has no representation on the King George County school board. However, several members of the school board work at Dahlgren NSWC. The base commander's office historically has been allowed non-voting representation to the King George County Supervisors Board. The base also plays a role in the local chamber of Commerce.

Base parents are proud of their participation on the Section 6 school board and support it wholeheartedly. Many parents stated they were satisfied with the easy access they had to their school board members and the quick responses they received. Parents expressed concern that they would lose this responsiveness if the Section 6 school was transferred. They would not have representation on the school board and, because they are transients, parents fear they would not be able to participate in the decisions that affect their children's education.

The King George County Board of Supervisors appoints five school board members, each representing a school district. On the issue of ensuring that Section 6 parents have representation on the school board if transfer takes place, the county representative argued that the base parents would have access to the board under existing mechanisms. The school board meetings are open and base parents can raise concerns there or individually with teachers and the county education supervisor. The official stated that consideration probably would not be given to an ex-officio school board member from the base.

School Assignment. If the Section 6 children were transferred, without the base facilities, the K-5 children would attend Potomac Elementary which is within a mile of the base housing area and the 6th through 8th graders would attend the middle school which is about ten miles from the base.

After the planned addition to the Potomac Elementary School is completed, King George officials plan to redistrict the school attendance at the elementary level. Transfer of the base elementary students at that time would cause the least disruption.

King George is under no desegregation court order. There is only one middle school and one high school in the county. Thus, transfer cannot be used as a means to redistrict for integration purposes or for using the base children to implement integration plans.

Parents from the base did not voice dissatisfaction about potential school assignment except for the following. Section 6 children now walk to school. Kindergarten through 8th graders can easily attend before school and after school activities without making transportation arrangements. If transfer occurs and the children are bused off the base, as would be the case, then the children would not have easy access to extra school activities. Parents claim that the roads between the base and the elementary school have heavy traffic and no sidewalks. Parents stated that the roads could not be walked safely by K-5 graders. The ten mile distance between the base and the middle school would require a parent to drop off or pick up children for extra activities. Thus, base parents argue that if a transfer takes place, their children might not have access to the same array of additional school activities as they now do.

Issues Related to Section 6 Employees. Transfer of Section 6 schools raises two types of issues regarding the Section 6 employees. First, decisionmakers must be concerned over whether the LEA, in accepting transfer, would have the staff capability to accept the Section 6 children without a drop in the level of education provided. One way to accomplish this is to employ the highly qualified Section 6 school personnel. Second, a major concern of base and Section 6 school administrators is the welfare of their employees under a transfer. Thus, they and their employees are concerned over the potential employment opportunities with the LEA as well as their status with the federal government in a transfer.

Dahlgren has a staff of 22: 18 excepted appointments who are teachers and administrators, one general schedule, and three temporary appointments. The LEA employs about 170 teachers of which approximately 15 percent turn over a year. The transfer of Dahlgren would require at most an increase in teaching staff at the LEA of nine regular classroom teachers and some special program teachers. In total this would be, if all Dahlgren teachers were needed, an increase of ten percent of the LEA teaching staff.

The following paragraphs discuss the second set of concerns: the status and welfare of the Section 6 employees in a transfer.

Job Security: Base employees worry that, given a transfer, the LEA would not offer them a job and the federal government would not provide them with other job opportunities. Most employees at Dahlgren are excepted appointment without any guaranteed RIF (reduction in force) rights or guarantees of further federal employment if the schools are transferred. Thus, these employees look for employment opportunities with the LEA or early retirement.

Job opportunities with the LEA are problematic due to the seniority of most base employees. The base teachers tend to be highly senior. Of the 14 teachers, three have had over 20 years teaching experience, five have had from 10 to 20 years of experience, and six have had from five to nine years of experience. This means that the teachers would tend to have higher salaries than newly graduated teachers with whom they may compete for a job with the LEA. The base teachers worried that the LEA could not afford to hire them at their current salaries. In a transfer, they would lose their job status.

Discussions with the LEA showed that the LEA's budget is tight. To reduce costs, it has recently offered early retirement to senior employees. This encourages hiring of new, younger teachers and reduces the LEA salary expenses by substituting lower-paid employees for higher paid employees.

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In addition, some teachers and employees are concerned that in a transfer, the LEA would not need their particular skills or specialities. For instance, it may be unlikely that the LEA would require additional physical education, art, and music teachers, whereas it may require regular classroom teachers. Thus, some are worried that even without their seniority, they may not be needed by the LEA.

Discussions with LEA representatives indicated that if a transfer occurred they would consider hiring base employees on the same basis as any others that applied for the job. Job openings at the LEA resulting from the transfer of children would be filled on a competitive basis by any teacher having Virginia certification. All Section 6 teachers have certification.

Salary and Years of Experience: Base employees are concerned that, if employed by the LEA, they would not earn the same income as now. Not only may pay scales be different between the two systems, the county may not accept all the years of experience that the base teachers have earned at Dahlgren. As Table 23 indicates, King George County tends to pay beginning salaries that are higher than those associated with the base school. However, the base school salaries surpass those of the county with increased years of service. The LEA representatives stated that the LEA, under Virginia law, would only accept five to ten years of experience from teachers of other school districts. Thus, those senior teachers from the base would not be able to transfer all of their years of experience into the King George system. It is likely that many base teachers would be employed only at a lower salary than they currently earn.

Retirement Benefits: Because of the seniority of the Dahlgren base employees, they are particularly concerned about their retirement benefits. First, many ask whether the federal government will allow them early retirement benefits. This is undetermined at this time. Second, if they become employed in another school district in Virginia, they are concerned over their ability to buy into the Virginia Supplemental Retirement System. To buy years of service in the Virginia system, employees would have to pay 15 percent of their current salary

Table 23

DAHLGREN AND KING GEORGE SALARY SCHEDULES (1988-1989)

Years of Experience	Dahlgren Salary ($)	King George Salary Comparison ($)
Bachelors degree		
Beginning	$19,360	$+2,240
10 years	29,670	-4,212
15 years[a]		
Masters degree		
Beginning	21,350	+1,900
10 years	32,110	-4,474
15 years	35,300	-4,853
Doctorate[b]		

[a] The salary schedule for teachers with a Bachelors degree does not go up to 15 years in Dahlgren; it does in King George County ($28,797).

[b] There are no doctoral level teachers at Dahlgren.

for each year of service bought. This may not be bought until after five years of service has been accumulated and any service bought cannot be used to satisfy the 30-year requirement for a full benefit before age 65. Thus, the individual buy-in option appears to be prohibitive.

Other Benefits: King George LEA provides group life insurance, partial payment for Blue Cross/Blue Shield health insurance, and early retirement.

OTHER ISSUES RAISED BY A TRANSFER

Effect of Transfer on Educational Services. The major concern raised by the Dahlgren parents and staff regarding a transfer is that they would lose a good school system that provides individualized attention to the base children. Base parents are impressed with the positive attention their children receive at the Dahlgren school. The small class size, homogeneity of the population, and few bureaucratic requirements allow the school's teachers to focus a great deal of attention on the transient student population. Students remain with the system for two to three years before their parents transfer. The planned growth of Dahlgren's training establishment will reduce this time. Trainees will be stationed at Dahlgren for approximately one year, resulting in a more transient population.

Parents and staff particularly mention four aspects of the Dahlgren school that they wish to maintain.

- *Screening and Placement*: The school provides individual screening as children enter the system and a quick response for those children in need of special attention or services. The school actively helps base parents whose children require special education or disability services not provided by the base. For instance, the base school provides a sign language interpreter for a deaf child and transportation to a special education facility in St. Mary's, Maryland, for a child who could not be helped by the LEA.
- *Class Size and Individual Attention*: The small class size allows teachers to focus more attention on individual students. In addition, it allows teachers to quickly and accurately report any potential problems to parents.
- *Community Center*: The remote location of the base encourages the school to become the center of activity for the base community; other activity is not available. Volunteerism is appreciated as is open communication with staff. Participation of parents in school activity ensures that the school reflects the community's values.
- *Electives*: Electives such as algebra and French are taught on a voluntary basis by the staff when enough children show interest. As a result, despite its small size, the school offers a broad curriculum.

King George county representatives concede that their program is not geared specifically for the military child, but the county does educate many military related children. The county provides a number of services to help students adjust, including screening of records, interviews by counselors, and testing with the approval of parents. Each school has a guidance counselor. The county acknowledges that proper placement may lag if slots are not available for students.

Base Growth and Effect. Dahlgren, as center for the AEGIS Training Command, provides the training facilities for the AEGIS systems that are being installed on surface ships. The command recently invested in new facilities at Dahlgren to provide AEGIS training; the new training mission will increase the number of permanent training staff at Dahlgren and the number of temporary trainees passing through.

Although the base school facilities are adequate for the present population, they may not be adequate for the projected population increase. The Navy is considering building additional housing for staff and trainees on base. If this is done, the dependents of the staff and trainees will be eligible for Section 6 schooling. The projected student growth may exceed the current capacity of the Section 6 facilities.

New growth in the Section 6 population will require the building of additional school capacity on base. This is counterproductive if, in fact, the school and children might be transferred in the near future.

Alternatively, the required housing may be built off base. Then the additional dependents would attend King George County schools. The addition to the King George Potomac Elementary School would enable the LEA to accept additional kindergarten through 5th graders without overcrowding. However, additional growth in the 6th through 12th grades may be more problematic. Using the past growth rate for the King George school population of three percent per year, the middle school will be at capacity in 1991 and the high school will be at capacity in 1993. New growth associated with the base may cause this extra capacity to be filled more quickly, forcing King George to accelerate construction at the 6 through 12 level sooner than currently planned.

The issues of transfer and growth are intimately connected in the eyes of the base and the county. If off-base housing is being considered, it must be considered in light of a possible transfer. For instance, required additional school capacity for the new growth may be taken up by the transfer of Section 6 students. This would require the county to finance the building of more capacity, unless the federal government agrees to help fund some additional capacity.

From the LEA's perspective, it would be preferable for any new growth in housing to be built off base for the following reason. Off-base residents pay local taxes either directly through the property tax or indirectly through rents, contributing to the education of the children associated with the new housing. However, if base housing is constructed for the new growth, the county, even with federal Impact Aid, cannot recover the costs associated with the education of base children. Additional 9th through 12th graders would go to the county school without their parents paying local property taxes. Furthermore, if the Section 6 school were later transferred, the county would be educating additional kindergarten through 8th grade children whose parents pay no county taxes and do not contribute financially to their children's education.

Thus, the combination of transfer and base growth poses an immediate need for some sort of resolution between the Navy and the county regarding the building of school facilities and additional housing. Any resolution must take into account the possible future transfer of the Section 6 schools and the heavy financial burden the county will undertake to provide additional capacity for base-related children, whether Section 6 or others.

Effects on Recruiting and Retention. The base commander and representatives from the base commands were concerned about a more important problem: effects of transfer on recruitment. The base commander noted that the commands located on the base require highly skilled military and civilian personnel, usually educated beyond the baccalaureate level. This requirement has resulted in recruiting problems in the past. Highly educated personnel, with many job opportunities, do not regard Dahlgren as an ideal place to locate. In particular, these personnel are interested in good educational opportunities for their children and access to a broad community.

Currently, many military personnel are willing to come to Dahlgren because of the base schools, which are viewed as a superior alternative to the King George LEA schools. The base commander stated that civilian personnel, who do not have access to Dahlgren school, tend to live in the vicinity of Fredricksburg and commute. This enables them to take advantage of the Fredricksburg school system, but requires a long commute and salaries that can afford the higher housing prices in Fredricksburg. The option is not possible for many military. In addition, King George County offers no alternatives, such as private schools, to the LEA schools.

The base commander thinks that transfer of the Section 6 school will affect the recruiting and retention status of the base. Without the school, recruitment will be more difficult and retention will fall. Both are costly alternatives to consider, in his opinion, for the small price paid for the schools.

The commander of the AEGIS training program had the same concerns. He stated that those considering entering the AEGIS career path must consider that they will be stationed at Dahlgren several times over their careers. They will be less likely to enter the field if attractive schooling is not available for their children. Thus, as head of a new program that will require large personnel growth over the next decade, he strongly supported the continuation of the base school.

DECISION SUMMARY

In deciding whether to transfer the Dahlgren school or maintain its Section 6 status, the following facilitating and impeding factors must be considered.

Factors that facilitate:

- In the event of transfer, a single county would have jurisdiction: King George County.
- The LEA currently educates the base 9th through 12th graders.
- The base and LEA have good relations that include existing agreements on busing the base 9th through 12th graders.
- Although not a large district, the LEA is substantially larger than the base school and could absorb the base children without great disruption.
- Access to the base and base security do not appear to be problems if base children attend facilities off the post.
- No integration problems would occur in a transfer.

Factors that impede a transfer include:

- Base parents are convinced that the education of their children will suffer if a transfer occurs.
- A number of indicators show that King George county is below the state and national average PPE and local support for education. This concerns base parents.
- Under current Impact Aid guidelines, the LEA would not recover the local contribution per student needed to educate the transferred students.
- Due to rapid base growth and expected county growth, the LEA would need to plan for additional facilities to handle the transferred students. Although, 6th through 8th grade students could be accommodated now, the K-5 students could not be accommodated until 1991.
- Base parents do not want to give up their influence over their children's education.
- The county would have to purchase up to three buses for the transportation of Section 6 students.
- Transfer may negatively affect the recruitment and retention of highly skilled military.

OPTIONS TO CONSIDER

There are two options to consider: No transfer and an assisted option.

1. No Transfer. There are clear indications that the base children are receiving a quality education that could not be supplied by the local community without additional financial support.

2. Assisted Option. The amount of funding available to support the LEA in a transfer is inadequate. An assisted option would be necessary with additional funding from the state and/or federal level. In addition, sources of funding for buses and additions to LEA facilities would have to be determined. Although immediate transfer of the 6th through 8th grades can be considered, transfer of the kindergarten through 5th graders would necessarily be forestalled until 1991 when facilities would be available.

Other Concerns. Without careful planning, base growth will only cause the current situation to become more complicated. In this particular circumstance, deferral of a decision to transfer or not to transfer may result in additional base housing, accompanied by growth in the base student population, the building of new base schools, etc. These actions will only make later transfer more costly and difficult, especially for the LEA. A carefully considered overall plan for growth of the base that includes a firm decision on the status of base schools is needed now.

The plan would have to include consideration for base parents' representation, the funding of additions to the LEAs schools, recruitment and retention issues, and future LEA growth.

XVIII. QUANTICO MARINE CORPS BASE, VIRGINIA

BACKGROUND: QUANTICO MARINE CORPS BASE

Founded in 1917, Quantico is the home of the Marine Corps Development and Education Command. Most Marines can expect to serve one tour of duty at Quantico.

Geography and Economy. Quantico encompasses 60,474 acres in Prince William and Stafford Counties. The housing and schools are located in Prince William County.

The base generates substantial income for the area, supporting an annual payroll of approximately $137.4 million, 30 percent of which goes to civilians working on the base.

History of the Section 6 Schools. The Quantico dependents school was established in 1919, two years after the base was founded. The post school originally provided elementary education for grades 1 through 7, a necessity as wives and children began living on the base. Originally financed through donations, tuitions, proceeds of the post exchange, and fund raising, the schools received some Virginia state funding during the 1930s as higher grades were added to the system. With the addition of the 12th grade in 1944, the Quantico dependent schools provided a complete school education. Today, Quantico is only one of four Section 6 school systems offering kindergarten through 12th grade.

Quantico's early history as a Section 6 school was turbulent. Financing of the Quantico schools passed to Section 6 programs in 1953. At that time, the Office of Education in the U.S. Department of Health, Education and Welfare (HEW) provided direct, sole financing of the schools under the annual Section 6 appropriation. However, only one year later, HEW exerted pressure to merge the Quantico schools into the Prince William County system. Resistance on the part of the base parents and Marine Corps leadership resulted in U.S. Congressional passage of what is commonly known as the "Quantico Amendment," which requires, among other things, that the Secretary of the relevant Service must agree to any transfer of a Section 6 school system to a local education agency.[1]

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[1] The amendment applies to P.L. 81-874, which established Section 6 schools.

The size of the Quantico school system has varied with the number of grades offered and the changes in the base population. The system reached its peak enrollment of 2,500 students during the Vietnam War in 1971. Since then, in part due to reductions in base housing, the school population has fallen by about 40 percent. The 1987 school enrollment was 1,458, with an average membership of 1,226. Students attend one of four facilities, consisting of three elementary schools and one high school.

BACKGROUND: PRINCE WILLIAM COUNTY

The U.S. Census Bureau includes Prince William County as part of the greater Washington, D.C. metropolitan area. Located 25 miles southwest of that city, the county encompasses 345 square miles and is part of the outer ring of counties surrounding Washington.

Prince William County has benefited from the extraordinary growth taking place in the Washington suburbs as residences and service industries move outward from the city along the transportation corridors. The Prince William population grew by 52.1 percent during the decade of the 1970s and an additional 13.6 percent during the first half of the 1980s. Current population is estimated at almost 200,000 and is expected to continue. Twenty-five year forecasts for the year 2010 project a 94.6 percent increase in the county's population, accompanied by a 72.3 percent increase in employment.

This population growth has had a major impact on the county's school system. With a 1986-1987 enrollment of approximately 37,800 students, Prince William County is now the fourth largest school district in the state.

FACTORS INFLUENCING TRANSFER

Table 24 presents data on a number of characteristics which influence the feasibility and ease of a transfer.

School Population: As Table 24 illustrates, the base school population is small compared to that of the county. If a transfer took place today, base students would make up only about 3.8 percent of the county school population. Because the base school enrollment will remain fairly static during the foreseeable future while the county school population will continue to grow, the ratio of county to base students will become even greater over time.

Prince William County already educates a large number of military dependents, who comprise about 14.2 percent of the total county enrollment.[2] They include children of Marines assigned to Quantico but living off-base, and children of military assigned to the many other military installations in the area. If Quantico base schools were added to the county, military dependents living on- and off-base would comprise about 17.4 percent of the Prince William County school enrollment.

Both the base and the county systems experience population turbulence. The Quantico schools have a yearly student turnover rate

Table 24

COMPARISON OF SCHOOL DISTRICTS

Item	Quantico	Prince William County
Enrollment (SY 1986-1987)	1,458	37,825
(Ratio base to LEA)		(1:26)
Grade span	K-12	K-12
Number of schools	4	52
Elementary	3	33
Middle	--	9
High School	1	6
Special education	--	4
PPE ($ SY 1987-1988)	$5,301	$4,350
Pupil/teacher ratio[a]	18	16.3

[a] Ratio calculated as enrollment/total number of teachers.

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[2] Based on statistics submitted in the Prince William County Application for School Assistance in Federally Affected Areas, 1987-1988.

ranging from 45 to 60 percent. A large number of students attend the schools for only one year. Quantico school officials note that this is a product of changes in the base housing population. In the past, 60 percent of the military living on-base were officers and the balance enlisted. Now the percentages are reversed as the officers assigned to longer tours of duty at Marine Corps Headquarters have been more likely to buy or rent off-base, while the enlisted serving one-year tours for training have been more likely to live on the base. Prince William County school officials note that they too have been dealing with a highly mobile population.

Interaction Between School Systems: Because Quantico provides the complete grade span and traditionally has been a separate school system, the relationship between the base and county schools has been limited. There are, for example, no formalized channels of communication between the two systems, nor does the Quantico base leadership have any formal relationship with the county schools, such as a representative for off-base military dependents' interests. However, Quantico does send approximately a dozen severely handicapped base students to the county schools. Prince William County provides the transportation for these students. Quantico contributes no financial support for their education, which is paid for by federal, state, and county funds.

The issue of a possible transfer has promoted more interaction between the base and the county systems. Quantico and Prince William County leaders have met to discuss the topic and agreed to keep in touch as events warrant. Prince William County set up a team which constructed a preliminary list of the issues that the county would need to address in the event of a transfer. These include questions concerning base parents' expectation; ownership and maintenance of the facilities; differences in curriculum; record keeping, school and administrative policies; school assignment; and access to the base. In addition, the county school leadership designated a single official to keep track of the issue and act as a point of contact.

Facilities: The condition and adequacy of the existing base facilities is an important consideration in LEA acceptance of a transfer. In the case of Quantico, all of the facilities are over 25 years old and capital improvement plans exist for all four Quantico base facilities. These include a replacement school for the oldest facility (built in 1942), a new roof for Ashurst Elementary, a heating distribution system for Russell Elementary, and a library addition for the high school. These projects will cost approximately $5.2 million and all have been funded, with the exception of the library addition ($185,000). School officials have several other unfunded proposals for additions and heat efficiency units, but, in general, the facilities comfortably accommodate the school population. In fact, a survey of education facilities on military bases concluded that Quantico has no outstanding unfunded construction needs.[3]

In contrast, the Prince William County school system has had difficulty keeping pace with the growth in school enrollment. Although five new school facilities will be built by 1991,[4] school officials forecast that they still will need an additional 10 to 12 new buildings over the next six years. These have yet to be funded, and to do so would take all of the county's funding capacity during that time frame. Meanwhile, the county currently uses 101 portable classrooms and will add another 23 next year. These are the equivalent of four buildings.

Given this facilities shortfall, county officials argue that they would need the base schools or substitute facilities if the Quantico students transferred to the county. Moreover, the county schools located nearest to the base are already overcrowded. Of the two options concerning the location of these facilities, county officials strongly prefer the provision of substitute facilities off the base, rather than continued use of the existing base schools.

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[3] See *Construction, Repair, and Rehabilitation Needs of Dependent School Facilities Located on Military Installations in the U.S.*, submitted to the U.S. Congress by the U.S. Departments of Defense and Education, September 1987.

[4] This is offset somewhat by the scheduled closing of one facility in the coming school year.

Prince William County school leaders cite several advantages to this approach, but the most important is that it solves the issue of facilities' ownership permanently. Without ownership, the county cannot legally expend public funds on major capital improvements. Quantico base leaders are not sure they would be willing to transfer title to the base facilities and indicate they may prefer to lease the buildings. Prince William County officials are familiar with the problems such a leasing arrangement has caused Fairfax County in the running of three schools located on Fort Belvoir. The federal government has provided no major capital funds for those schools since the school system was transferred to Fairfax in 1969. The buildings have deteriorated to the point that a recent survey determined it would take in excess of $10 million to address unmet legal, health, safety, and capacity requirements.[5] Citing this example, Prince William County officials argue that the only long-term solution is for the county to have title to substitute facilities off-base. Then the county could take over the responsibility for long-term maintenance and upkeep. A secondary advantage to such an arrangement is that the substitute facilities could be built in locations that best suit the county's overall facility needs. Finally, county officials find it much more attractive to take over new buildings than to deal with inevitable upkeep needs of the older base facilities. For example, one of the base elementary schools has some enclosed asbestos which will be very expensive to remove.

Access to the Base: Quantico is an open base. The Prince William County school system already has access to bus base students receiving special education from the county. In addition, county school buses cross the base to transport children from the town of Quantico, a village cut off from the rest of the county by the base, to schools on the other side of the base.

In general, access to the base does not appear to be an impediment to transfer. Base officials currently have no plans to tighten their control of access any further and, therefore, they foresee no problems from a security or administrative standpoint if the county takes over the schools.

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[5] *Construction, Repair, and Rehabilitation*, 1987.

LEA Financial Resources: Financial support for education in Prince William County is illustrated by the increases in the operating budget and per-pupil expenditure (PPE) since FY 1985. The total operating fund has increased from $15 million to $20 million each year, whereas the PPE for operations fund and debt service increased from approximately $3,600 in FY 1986 to $4,300 in FY 1988. If next year's proposed budget is approved, the PPE will increase to $4,900.

Local government plays a large role in assuring adequate financing of education. For example, while the average Virginia local contribution to the PPE was 46.6 percent in SY 1985-1986, in Prince William County local funds constituted almost 50 percent.[6] Levying power resides in the Prince William County Board of Supervisors, who must approve the school budget. The major source of local revenue is the county general fund transfer, although a small amount of funding is also generated from such sources as adult education, summer school, and out-of-county tuitions. The growth in the county's population has helped; the estimated actual value of taxable property has been increasing by about $500 million per year since FY 1984.[7]

The local government has imposed financial restrictions which may reduce the ability of the school system to meet its construction needs over the next six years. The county supervisors have voluntarily limited the county's bonded indebtedness in order to maintain a higher bond rating.

Most of the financial resources are provided by the state and local governments, and the Prince William County schools receive only minor funding from the federal government. Over the last four years, the federal share of the PPE has been less than 2.5 percent. Although the county receives some funds from a number of federal programs, the two largest federal sources are Title VI-B for education of the handicapped and Impact Aid. In the case of the latter program, Prince William County is a Super B district, with a little over one-fifth of the county school population qualifying for aid. School officials predict the county should receive $1.67 million from Impact Aid in FY 1988.

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[6] See Virginia State Department of Education, *Facing Up--21: Statistical Data on Virginia's Public Schools*, June 1987.

[7] Assessments during this period have ranged from 99 to 97 percent of the estimated actual value.

The transfer of the Quantico students to Prince William County would penalize the county financially. The Quantico base students would constitute less than 4 percent of the county school enrollment. Therefore, Prince William County would receive Regular A federal Impact Aid to reimburse the county, resulting in a considerable shortfall. For example, last year, the local contribution was $2,082 per pupil, but the Regular A Impact Aid payment per pupil was only $629.

Despite lack of federal financing, Prince William County school officials made no mention of invoking Section 22.1-5 of the Virginia Code, which allows school boards to charge base students tuition if Impact Aid funds are less than 50 percent of the total per capita cost of education.

School Board Voting and Representation: In Virginia, there are no school board elections. In the case of Prince William County, the Board of Supervisors appoints the seven board members, each representing a school district, for four-year terms.

Concerning the issue of ensuring that base parents have some input into their children's education in the event of a transfer, county school officials argued that base parents would have access through a number of existing mechanisms. These county officials react negatively to the suggestion that an ex-officio school board member represent the interests of base parents.[a] They fear the establishment of a position for one special interest group would lead to similar demands from other groups. However, county school board meetings are open, and persons wishing to speak can get their names on the agenda beforehand. In addition, parents can serve on a number of county-wide advisory committees as well as the advisory council for each school.

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[a] Under Virginia law, nothing would prevent the Board of Supervisors from naming a base parent; whether this would actually happen is a matter of local politics.

School Assignment: If the county took over the base schools, there probably would be several changes in school assignment. First, the county's approach to middle school would result in the transfer of 6th graders to county middle schools. Moreover, since Quantico's high school classes are so small,[9] county officials stated that they would reassign those students to one of the county high schools. Finally, due to the overcrowding of county schools in the nearby Dumfries/Triangle area, Prince William County officials would like to explore the possibility of assigning some of those students to the base schools. The latter possibility concerns base leaders who fear they could lose "their neighborhood schools."

Prince William County is not under a desegregation court order and, therefore, would not have to realign school assignments to meet court guidelines.[10]

Issues Related to Section 6 Employees: Quantico has a staff of 141: 117 excepted appointments (principals, teachers, and resource personnel), 18 general schedule employees (primarily administrative staff), and 6 employed under wage grade status (maintenance staff).

A major concern of all of the employees is, naturally, their continued employment. If a transfer took place, general schedule employees would have the protection of RIF (reduction in force) procedures, which allow these employees to "bump" or displace less senior civil servants in similar job categories. For the others, the future is uncertain, a factor that has affected morale and retention of personnel.

Representatives of the teachers have already begun exploring the consequences of a transfer. Almost all of the teachers belong to the Quantico Education Association (QEA), affiliated with the Virginia and National Education Association. QEA leaders have investigated how Virginia and Prince William policies would affect the employment status and benefits of teachers. The issues raised by the teachers include:

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[9] Quantico has only 150 9th to 12th graders. Last year's graduating class numbered 40.

[10] Quantico has a minority school enrollment of 35 percent; Prince William's is 15 percent.

Job Security. Base teachers worry that special area teachers might be particularly vulnerable in the event of a transfer. Prince William County officials, however, expressed a moral obligation to hire the Quantico employees if they qualify, i.e., meet Virginia certification requirements, which they do. The Prince William County growth rate is such that the county schools should be able to absorb all the Quantico teachers and staff.

Salary. As Table 25 illustrates, Prince William County tends to pay beginning salaries that are higher than Quantico's beginning salaries. However, the base salaries surpass those of the county with the increase in years of service. However, in addition to the basic salary schedule, the county provides longevity supplements which further close the gap between the two systems. Over a period of ten years of service, the county teachers at the top of the salary schedule can earn an additional $700 to $2,700. Similar supplements exist for the other categories of employment.

Table 25

DIFFERENCES BETWEEN THE QUANTICO AND PRINCE WILLIAM COUNTY SALARY SCHEDULES (1987-1988)

Years of Service	Quantico Teachers' Salaries ($)	Prince William County Comparison ($)
Bachelors degree		
Beginning	$18,544	+$2,456
8 years	25,962	-249
12 years	29,670	-511
Masters degree		
Beginning	21,326	+74
8 years	29,300	-1,547
15 years	37,088	-2,910
Doctorate		
Beginning	23,180	-23
8 years	31,710	-1,966
16 years	40,611	-3,745

Years of Experience. An issue related to the size of a teacher's salary concerns how many years of experience will be credited to base teachers transferring into the county system. Senior teachers fear they could lose considerable credit because most area school systems grant only up to five years of experience to incoming teachers. Again, due to the unique situation at Quantico, Prince William County officials indicate a great deal of flexibility is needed on this issue, raising the possibility of full credit for Quantico employees' years of experience.

Retirement Benefits. QEA leaders have examined the buy-in options offered by the Virginia Supplemental Retirement System[11] and concluded that they are prohibitive. Only state legislation to change some of the requirements, they conclude, could make it a viable option. Teachers who will be most adversely impacted are those with 10 to 19 years invested in the federal retirement system. Those with fewer years can start again in the Virginia system, having only a limited investment in federal retirement, which might be converted to the Virginia system. Those with 20 or more years have enough invested in the federal system to still earn significant retirement benefits. Forty-six percent of the Quantico teachers have been employed by the federal government for ten or less years. Another 24 percent have accumulated over 20 years toward retirement. The remaining 30 percent fall in the most vulnerable years of contribution to the federal retirement system.

Benefits. Prince William County provides medical and life insurance, sick leave, Virginia supplemental retirement, and Social Security.

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[11] See discussion of employee issues in the preceding section for details of conditions governing a buy-in.

OTHER CONCERNS RAISED BY THE PARTIES TO A TRANSFER

The major concern raised by Quantico parents and staff about a transfer is that they would lose a good school system, geared to the demands of military life and the base community. Their argument is not that Prince William County does not provide a good education, but that the county is a large and more inflexible system which is unlikely to focus attention on the needs of the transient military child. Quantico's proponents cite a number of ways in which the base schools meet their particular needs:

- *School calendar accommodates the military schedule.* For example, Quantico schools begin the last week of August instead of Labor Day.
- *Quick reaction time to student needs.* For example, if a student requires testing, it is done within two weeks. Students are placed into special programs rapidly and easily. When a family is reassigned, student records are ready in two days.
- *Staff and peer group provide a supportive environment.* Many of the staff are military spouses who understand the stresses of military life. Teachers are sensitive to making new children welcome and providing them with opportunities to participate. Parents have a high degree of volunteer participation, thereby helping to make it a community school.

Quantico parents and staff perceive other advantages to the base system. First, compared to the county, Quantico has more full-time resource staff assigned to elementary schools.[12] Second, the base school can be more flexible than a system tied to state regulations. For example, the state reviews textbooks every eight years; Quantico does it every five years. Third, the smallness of the base system encourages a more individualized approach. Finally, and probably most important, parents perceive the schools as a neighborhood system, reflecting community values.

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[12] Each elementary school has a math teacher, reading specialist, physical education teacher, and learning disability therapist.

Prince William County officials concede that their program is not specifically aimed at the military child, but the county does educate a highly mobile population. The county provides a number of services to help new students adjust. For example, each school has a reading teacher over and above the required Chapter 1 personnel. Next year, each elementary school will have a guidance counselor. Counselors run "new school" sessions for students transferring in during the school year.

In addition, Quantico students could benefit from a transfer. From an educational standpoint, administrators in both school systems point out that the larger county high schools can provide a wider curriculum and more varied opportunities.

Finally, there is considerable evidence that the Prince William County system is above the national average in performance. The following provide some indications of this. In a 1986 survey, 70 percent of the schools' parents gave Prince William County an A or B rating. In 1985-1986, the Prince William County PPE ranked 20th out of the 136 school districts in the state. Standardized testing scores show that county students are scoring higher than the state and national averages.[13] In 1987, 56 percent of the high school graduates went on to either community or four-year colleges.

DECISION SUMMARY

In deciding whether to transfer the Quantico schools or maintain their Section 6 status, the following facilitating and impeding factors must be considered.

Factors which facilitate a transfer:

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[13] See *Information: Prince William County Public Schools, 1987-1988.*

- Although the base is located in more than one county, state and local officials agree that Prince William would have jurisdiction over the base schools.
- Prince William County is one of the largest districts in the state and could easily absorb a base population less than 4 percent the size of the county's current enrollment.
- County and base officials have made initial contacts concerning the issue and some consideration has already been given to the details which would have to be negotiated if a transfer took place.
- Access to the base does not appear to be a problem. Prince William County buses already transit the base.
- Prince William County has a strong and growing tax base, and county leaders have demonstrated support by providing about one-half of the PPE out of local funds.
- A number of indicators suggest that the Prince William County system is above the state and national average. Base parents do not deny that the county provides a good education.

Factors which impede a transfer:

- Under current Impact Aid guidelines, Prince William County would not recover the local per-pupil expenditure of educating base students.
- Due to the rapid growth in school enrollment, the county would need the use of existing or equivalent facilities. However, state and county officials are wary of taking over facilities under conditions which would make provision for long-term upkeep uncertain.
- Base parents do not want to give up the influence they have over their children's education through school board elections. They do not want to transfer a school system which is perceived as an integral part of the community.

OPTIONS TO CONSIDER

The conditions which normally characterize the existence of a Section 6 school do not exist in Prince William County. The local county is not too small, too rural, nor too resource-poor. Desegregation compliance is not an issue. The county school system does not provide a below-average education. Rather, Prince William County schools have an above-average reputation. Given these circumstances, the Quantico school system is more ready to be considered for transfer than most Section 6 schools.

1. **No Transfer.** The status quo could be maintained. Both the base and the LEA are satisfied with the current arrangement. Base parents feel that their children benefit from a school geared to the needs of military dependents.

2. **Transfer with an Assisted Option.** Most of the impediments to a transfer could be addressed through negotiations. The two major issues are financing and facilities. Prince William County would qualify for Impact Aid, but at a rate lower than the per-pupil contribution. The concern of Virginia state leaders over the funding shortfall could be alleviated by using the assisted option--allowing additional funding from federal or state sources to make up the difference between the local per-pupil contribution and Impact Aid.

The problem of facilities arises from both state regulation restricting capital outlay for buildings not owned by the school district and past federal intransigence against authorizing construction funds for federally owned facilities. The problem is relieved in part by the county's intention to transfer middle and high school students off-base, although Prince William County might request federal or state funding to provide equivalent capacity off-base.

The real dispute will be over the elementary schools. Base parents can be expected to fight to keep the younger children in the neighborhood schools. The base, however, may be reluctant to transfer the ownership of the three elementary schools to the county. Any satisfactory outcome to this debate will take guarantees on both sides. If title is transferred, base leaders will want assurances that the property will be satisfactorily maintained. If the facilities are leased, the federal government will have to make a creditable guarantee that the major capital improvement needs will be met.

Finally, parental fears may be alleviated if the county reassures them that their input will be solicited through such mechanisms as parent advisory committees.

Appendix A

IMPACT OF TRANSFER ON LEA FINANCING

The following tables identify how much federal Impact Aid is likely to accompany each Section 6 student transferring to LEA schools and whether this amount is equal to the local per-pupil contribution. Table A.1 provides the enrollment data needed to determine each LEA's Impact Aid status. Table A.2 shows each LEA's current Impact Aid status and how this would change if Section 6 students were transferred. Table A.3 contains projected state per-pupil contributions and federal Impact Aid per-pupil funding, and highlights whether the total exceeds, equals, or falls short of each school district's projected total per-pupil expenditure.

Table A.1

ENROLLMENTS OF FEDERALLY CONNECTED STUDENTS: FY 1988

		A		B			
		Military	Civilian	Military	Civilian	Total	Percent Membership
Alabama							
Ft. McClellan	510						
Calhoun County		55	17	1,036	2,132	3,240	29
Anniston		40	68	266	560	934	21
Jacksonville		127	0	270	297	694	41
Fort Rucker	1,145						
Coffee County		0	0	47	220	267	14
Dale County		1	0	76	351	428	16
Daleville		87	0	380	403	870	57
Enterprise		0	139	1,136	1,199	2,474	46
Ozark		201	3	567	896	1,667	43
Maxwell	521						
Montgomery County		464	9	1,932	5,219	7,624	21
Georgia							
Ft. Stewart	1,551						
Liberty County		658	0	2,251	932	3,841	53
Louisiana							
England AFB	572						
Rapides Parish		209	8	507	1,003	1,727	7
New York							
West Point	675						
Highland Falls		215	unk	0	unk	1,090	unk
South Carolina							
Ft. Jackson	982						
Richland County No. 2		348	0	1,026	671	2,045	17
Laurel Bay MCAS	1,141						
Beaufort County		324	2	951	897	2,174	19
Myrtle Beach AFB	683						
Horry County		99	0	538	202	829	4
Virginia							
Dahlgren	154						
King George		20	1	74	717	812	34
Quantico	1,988						
Prince William County		35	7	5,602	3,029	8,673	22

SOURCE: U.S. Department of Education, Division of Impact Aid Application for School Assistance in Federally Affected Areas, Filings for FY 1988.
unk = unknown.

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Table A.2

IMPACT AID CATEGORY: 1987

	Current Impact Aid Status A	Current Impact Aid Status B	Under Full Transfer Impact Aid Status[a] A	Under Full Transfer Impact Aid Status[a] B	Change
Alabama					
Ft. McClellan					
Calhoun	Regular	Super	Regular	Super	No
Anniston	Regular	Super	Regular	Super	No
Jacksonville	Regular	Super	Super	Super	Yes
Ft. Rucker					
Coffee County	None	Super	Super	Regular	Yes
Dale County	Regular	Regular	Super	Regular	Yes
Daleville	Regular	Super	Super	Super	Yes
Enterprise	Regular	Super	Super	Super	Yes
Ozark	Regular	Super	Super	Super	Yes
Maxwell AFB					
Montgomery	Regular	Super	Regular	Regular	Yes
Georgia					
Ft. Stewart					
Liberty County	Regular	Super	Super	Super	Yes
Louisiana					
England AFB					
Rapides Parish	Regular	Regular	Regular	Regular	No
New York					
West Point					
Highland Falls	n.a.	n.a.	Super	n.a.	Yes
South Carolina					
Ft. Jackson					
Richland County 2	Regular	Regular	Regular	Regular	No
Laurel Bay					
Beaufort	Regular	Regular	Regular	Regular	No
Myrtle Beach					
Horry County	Regular	Regular	Regular	Regular	No
Virginia					
Dahlgren					
King George County	Regular	Super	Regular	Super	No
Quantico					
Prince William County	Regular	Super	Regular	Super	No

SOURCE: U.S. Department of Education, Division of Impact Aid, Application for School Assistance in Federally Affected Areas, Filings for FY 1988.

[a] Assumes each jurisdiction accepts all base children, whether they reside in jurisdiction or not.

n.a.: Not applicable.

Table A.3

O&M FUNDING BASE FOR TRANSFER WITHOUT LOCAL CONTRIBUTION: FY 1988, SY 1987-88

	Projected State Contribution A	Projected Impact Aid B	Projected Total C	Projected PPE D	Difference E
Ft. McClellan					
Calhoun County	1,891	565	2,456	2,545	-89
Anniston	2,094	565	2,659	3,485	-826
Jacksonville	1,894	1,824	3,718	2,709	+1,009
Ft. Rucker					
Coffee County	2,155	1,824	3,979	3,109	+870
Dale County	2,205	1,824	4,029	3,021	+1,008
Daleville	2,063	1,824	3,887	3,090	+797
Enterprise	1,740	1,824	3,564	2,634	+930
Ozark	1,957	1,824	3,781	2,751	+1,030
Maxwell AFB					
Montgomery County	1,843	565	2,408	2,817	-409
Fort Stewart					
Liberty County	1,328	1,824	3,152	1,947	+1,205
England AFB					
Rapides Parish	1,881	565	2,446	3,043	-597
West Point					
Highland Falls	n.a.	n.a.	n.a.	n.a.	n.a.
Ft. Jackson					
Richland No. 2	1,414	565	1,979	3,070	-1,091
Laurel Bay MCAS					
Beaufort County	807	565	1,372	3,301	-1,929
Myrtle Beach AFB					
Horry County	1,140	565	1,705	3,058	-1,353
Dahlgren NWSC					
King George County	2,035	565	2,600	3,641	-1,041
Quantico MCAS					
Prince William County	1,963	565	2,528	4,199	-1,671

SOURCE: A & D from unadjusted local school district data provided by state education agencies and National Education Association, Estimates of School Statistics, 1986-1987.

B from U.S. Department of Education, Office of Impact Aid FY 1988 Rates.

n.a.: Not applicable.

STATE SOURCES

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